99 Mile - 108 Mile House
British Columbia

DESTINATION CROSS COUNTRY SKI AREA MASTER PLAN

Prepared for: Ministry of Tourism/
100-108 Mile House

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99 Mile to 108 Mile House Destination Cross Country Ski Area Masterplan

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November, 1991

FOREWORD

The 100 Mile House area has long had a reputation in Western Canada as a leader in the provision of cross country skiing. The largest and most recognized annual ski event, the Cariboo Marathon originates from this small community in B.C.'s interior. The commitment and support for the continued growth and development of cross country ski facilities has given the community it's identity as "Canada's cross country ski capital".

In an effort to further capitalize on expanding opportunities for cross country skiing and indeed, even year round, multi use trail activities that could increase overall tourism visitation into this area, the community of 100 Mile - 108 Mile House, with support from the Ministry of Development, Trade and Tourism, have initiated a study to prepare a Master Plan to provide a blueprint for immediate improvements and longer term development.

The Study expands on the recently completed **South Cariboo Trailblazer** report completed for the Cariboo- Chilcotin Economic Futures Committee by providing a more detailed investigation into implementing trail development strategies that will create economic benefits for the community.

Our appreciation is given to members of the Committee established for this project and for the time and input they provided throughout. We also extend our thanks to the many individuals with whom we met and who gratefully provided information and data relevant to this study.

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EXECUTIVE SUMMARY

The Province of British Columbia has been historically dependant on the strength of its primary resource industries for its financial well being. As markets for its mining, forestry, fishing and construction products continue to suffer losses in the mid and late 1980's, provincial tourism expanded at an increasing level, beyond the $2 billion recorded in 1981. Recent years' tourism performance continues to exhibit continuing growth as the primary resource sectors languish: tourism is now considered to be the province's number one employer.

The study area is centred around the **100 Mile House area** of the South Cariboo region. The area's economy is comprised primarily of forestry based businesses, followed by ranching and tourism in that order. With growing scrutiny of forest industry practises and continuing instability in markets for the region's forestry products, alternative economic generators are required to assist in stabilising the area's future economy. In this context, efforts are underway to determine the year round potential which tourism represents, and winter tourism potential in particular using the extensive existing trail network and the strong reputation the area has for cross country skiing.

With a local population of approximately 1750, within a regional population of almost 6,000 people, 100 Mile House is less than 6 hours driving distance from the province's largest population density of Vancouver, along a safe, relatively high speed highway. This permits the community to be easily accessible year round to its primary seasonal tourism market segments from the lower Mainland and Pacific Northwest region of the USA. In addition, it is regularly serviced by rail, bus and air links to major regional, provincial and interprovincial centres.

In considering the development of a 100/108 Mile House centred trail system the freehold or crown ownership status of land under consideration must be addressed to identify potential constraints and limitations to proposed improvements. The study area comprises a mix of both, with potential for incompatible trail use between motorised and non motorised use, likely. In addition, we identified a number of legal issues, access constraints, logging (timber cutting rights) practises, native land claims and wildlife habitat matters which require sensitive handling in order for the trail development as proposed to proceed to completion in a timely, cost effective way, with optimum good will retained between all parties.

In researching the feasibility of establishing a major destination trail based tourism attraction we first began by examining tourism trends and profiles. There appears to have been some falling away in cross country ski participation reflected in recent years' studies, from early 1980's volumes. Despite this, skier profiles are consistent with earlier year's findings for both Canadian resident and U.S. non resident skiers, with the sport continuing to attract an upwardly mobile clientele. A 50/50 male/female mix, the majority remain family participants drawn from the more affluent levels of professional and management occupations. Despite a trend towards greater participation in the 24-34 years of age segment, skiers over 45 years of age continue to be the primary target market. In addition, there is evidence to support previous study findings which showed healthy (25%) cross over from alpine to cross country skiing, and that cross country ski participants represent excellent potential for a non winter trails experience (i.e. mountain biking, hiking), beyond their alpine counterparts.

In terms of ski area operations we found that most centres typically include a wide range of both non trail fee and commercial enterprises, with operating management spanning a range of sophisticated facilities, mainly at alpine based complexes, to "life style" owner operated businesses, providing a minimum range and quality of cross country experience, as a back up to non winter trail based operations (which in the Cariboo is largely horse programme oriented). The majority of cross country skiing is day use, with overnight stays representing 33% of skier activity. Cross country skier volumes continue to be strongest at non trail fee charging areas, although, as the quality and diversity of trails' experience is recognised as increasing trail usage, there is increasing evidence of more operations assessing trail fees to partly offset the increasing costs of maintaining trails in acceptable market condition.

The recognition that improved trail conditions and the provision of an increasingly diverse trails' experience will attract higher usage, for which the sophisticated skier is willing to pay, continues to exhibit itself in recent year trends in both marketing and trails' management innovation. Marketing attempts to identify and penetrate potential market segments not previously targeted, with trails management experimenting with a range of ways to both extend the winter season, and retain optimum snow coverage through better trail design, grooming practices and snow farming techniques.

The Lower Mainland of the province, with its high population density logically dominates commercial day use cross country skier volume. By contrast, the Cariboo and Okanagan regions

are the preferred areas for a majority of overnight (Destinations) skiers. Accordingly, we concluded that the study area has the potential to increase its share of the destination winter tourist market, providing that it is able to meet target market expectations, through well planned trail development, marketing and management. Further, it was our view that, properly conceived, a well developed trail system would have a reasonable opportunity to penetrate a wide range of non winter trails' oriented target market segments, lessening the severe seasonal fluctuations which typically effect tourism areas and operations within the province, including the study area.

Non resident visitors to the province account for 55% of year round visitor travel, with non resident Canadians, particularly Albertans, followed by U.S. citizens, representing British Columbia's primary non resident marketplace: South Western B.C. is the area's primary year round market and will represent future direct competition for year round trails' markets targeted by the area. The Cariboo share of this has fallen from 3% in 1979 to 1% of tourism expenditures in 1989, presumably a result of a lack of seasonal tourism opportunities. By contrast with provincial averages, the Cariboo region attracts a higher number of both overseas and U.S. visitors, with a significantly greater proportion of all visitors participating in an outdoors' experience, year round: which includes hiking, backpacking, trails and wildlife viewing as the major activities. The region does not currently show the effects of the province's successful winter ski marketing efforts, with winter visitation accounting for only 5% of year round volumes.

The Okanagan/Thompson/Interior region, of which the 100 Mile House area is a part, accounted for an 18.6% share of the province's cross country ski activity in the 1985/86 winter season. It is our view that, with the completion of the trails' development under study, this should increase to 23% after completion in 1992 and stabilize at 26.5% by 1994. Further, we felt it reasonable to project that the Cariboo region would penetrate 75% of this marketplace, with the 100/108 Mile House area recording 50% of this activity on a stabilised year basis. Similarly, and on the assumption that snowmobile trails would be upgraded as part of the overall trails' development project, we felt that the study area should record 50% of all snowmobile activity in the region, which latter should account for 20% of provincial destination snowmobile visitations.

Hiking, backpacking, wildlife viewing and non winter trails activities continue to show year over year growth in the order of 19%. After completion of the trail system, the area should increase its penetration of these core non winter activities. We estimated a 33% share of non winter regional trail activity, annually, after completion.

In terms of total year round demand, we estimated that the study area could have attracted approximately 45,000, year round trail use related visits in 1990/9. The majority of these participants presently represent NON WINTER trail users (i.e. trail riding). However, as the trails are upgraded and further developed we expect that cross country ski use will increase from its current level of 12,000 participants to over 22,000 visits by 1994. Total trail use by 1994 for all activities is projected to exceed 65,000 visits.

Room demand is strongest during the summer months, with area room occupancies in the high 80% range. By contrast, demand drops off so dramatically after Labour day that economic support for additional rooms is not easily rationalised; although one resort operator is presently completing a planned small expansion and another operator will likely proceed in the new year. It is likely that once the trail system has firmly established itself with its market, seasonal fluctuations will be somewhat mitigated, encouraging existing accommodation operators to expand their facilities and encourage other, new facilities to be developed.

Our review of area accommodation infrastructure concluded that, in general, the basic provision of rooms, food , beverage and recreation was acceptable, but at the lower end of the range of what we would consider desirable for the experienced (and particularly, destination) visitor. Motel facilities best met their market expectations, followed by commercial hotels with the resorts surveyed falling short of what we perceived to be their optimum market place expectations.

In terms of its existing trail infrastructure, although the area is unique in Canada because the majority of its 200 kilometres of trails have permanent, registered rights-of-way; we perceived that experienced trails visitor expectations are not adequately met. Many of the existing trails are in a "rough" condition and there are few elements (i.e. such as staging areas, trail amenities, good signage, etc.) which give a professional finishing touch to the overall system. Trails' development and management must successfully address this if the market segment penetration projected in this study is to be achieved.

After review, we concluded that the area would benefit most by establishing a full time, professional trails management organization. In addition, it would be important to develop a trademark/signature identity and trails character to help bring the current trails' network up to acceptable market standards and appeal to a wider trail oriented marketplace.

Our preferred development concept is based on the opportunity which the area has to tastefully and effectively market its culture, history, heritage and folklore. While an expansion of the existing length of trails is important and is included in our recommendations (particularly to develop a high elevation, 50 kilometre Marathon Trail route), improving existing conditions to provide a wider range of trail experiences in a themed environment, and the designation of a trails hierarchy should have greater potential for increasing trail use, year round.

Preliminary development costs were estimated at $1.2 million and included such items as; trail upgrading and expansion, signage, staging area improvements and various trail related facilities and shelters with a Trails Business Office based in 100 Mile House. This would be affiliated with the Regional Trail Foundation and would be the body charged with the professional management of all aspects of the trails, including fiscal matters, cost effective target marketing, and trails maintenance. Fiscal matters would include the generation of revenues on a seasonal basis from sources other than trails, and would consider food and beverage opportunities, merchandising of retail items and special events. We contemplated that to be effective a minimum permanent staff of four would be required, year round, three of whom would be under the jurisdiction of a Managing Director (Chief of Trails).

Based on the above, we developed several alternative scenarios of revenue and expense projections, for illustrative purposes, on both winter only and year round trail operations. We concluded that on a consolidated basis, the year round alternative, providing the widest range of revenues directly from trail use and from other, stated sources, would provide the most acceptable levels of income for debt servicing purposes. Further, we estimated that the potential economic benefit of this preferred approach to the study area should be within a range of between **$4.74** million after completion of the first full year of operation, rising to **$9.3 million** by the completion of the third full year of year round trail use.

We believe that despite the relative significance of trails and trail use in a recreation / tourism framework, that most trails are taken for granted and their full economic potential is never realized. Yet, societal trends and tourism profiles continue to support the fact that interest in trail activities and trail related use will increase. **In conclusion, we feel that the 100 Mile House area has the opportunity** to capitalize on this oversight and with proper commitments can **put in place an exemplary trails based infrastructure that will gain it international recognition and increased tourism visits.**

1.0 SCOPE OF STUDY

In an effort to extend and diversify the tourism base in the 100-108 Mile House area, a number of tourism operators have joined together to further promote the development of cross country skiing. The 100 Mile House area already generates the largest number of commercial cross country skier visits outside of the lower mainland, providing about 10% of the total annual cross country skier days. **[12,000 skier days]**. In addition, the area promotes an existing trail system totalling more than 200 kilometres that was initially planned and developed by the original developers of the 108 Resort in the mid 1970's.

Interest has concentrated on upgrading and expanding the ski trail network, with the objective that it can be marketed internationally as a primary cross country ski area destination in British Columbia. In order to determine the feasibility of expanding the existing network of cross country ski trails, the Ministry of Tourism in association with the Cariboo Tourist Association [CTA] undertook the preparation of this study.

The scope of this study is intended to provide a comprehensive plan of the area's cross country ski development potential and to present distinct options for achieving this potential within a very short period of time of approximately 18 months. The prime objective of the study was to identify the potential for an international destination trail system in the area. Towards achieving this objective one goal was to expand on the broad recommendations presented in the recently completed **South Cariboo Regional Trails Study** [SCRT] which identified opportunities for developing an expanded regional trail network to attract a wide range of year round trail users.

The Regional Trail Study also demonstrated that quality trail development properly funded, marketed, and supported by a strong community commitment can provide significant economic and tourism benefits.

The 100 Mile to 108 Mile House Masterplan is intended to provide a more detailed examination of the site specific recommendations made in the SCRT study, in order to provide a framework to successfully develop a true destination quality cross country ski trails network.

The enhanced trail system will also benefit the area in the summer season and serve to expand the marketing potential of the area. By reaching this objective, it is expected that tourism employment can be stabilized to a large degree.

In completing the field assessment and preparing this report the following elements have been addressed in detail:

- identification and assessment of existing trails;
- examine potential linkages between trail activity areas,
- determine strategic locations for future trail development,
- prepare proforma development costs to implement the proposed program

In addition, in assessing the existing trail system and all of its ancillary service and related infrastructure we have considered the following critical components:

- market potential for trail use in winter and year round in 100 Mile House
- integration into the regional trail network proposed in the SCRT study
- marketing strategy

In order to successfully implement the proposed trail development and expansion program, we have established guidelines relative to not only an organizational structure but also the business management and operational contexts of a revamped trail network.

1.1 Study Approach

The proposed trails development program is predicated on the system being implemented as proposed, where the design has accommodated the needs of the winter outdoor activities' oriented visitor, in order to capture a sufficient portion of the targeted markets which will produce the anticipated economic and other benefits to the area. As a catalyst, the additional benefit should be the enhancement of existing tourism operations and potentially the development of additional quality support services and facilities to meet the demands of an expanded market and local economy.

NordicGroupInternational [NGI], a professional tourism development consulting firm with wide scale North American experience in the planning, development and marketing of cross country ski areas, four season recreational trails and destination resorts, was engaged by Tourism British Columbia to undertake a review of the existing trail system in the 99-115 Mile House area in order to assess its potential for development into a major destination attraction and the prospects to achieve an economically viable return on the necessary investment that will be needed.

In completing this assignment, it is our understanding that this report will be used as a basis for setting out not only the trail system needs and the related support services, but also the means for securing the operational and capital funding that is required to implement the proposed program over the proposed development period. Accordingly, the specific tasks that we have undertaken include:

- Met with representatives from the 100-108 Mile communities and Tourism BC to review the terms of reference, identified effective contacts to assist in the fieldwork, delineate the reporting lines, establish report presentation criteria, and scheduling;
- Met with representatives of the various district, federal, and provincial government departments including Forestry, Tourism, Transportation, and Crown Lands;
- Completed a thorough site inspection and assessment of existing trails in the area by air, foot, horseback, mountain bike and snowmobile to establish the range of existing trails both currently in use and previously in use to determine the topographic potential for developing linkages as well as expanding the existing trails into an integrated system with optimum market appeal;
- Mapped existing trails in the region to the extent that reliable trail routing information was available, and prepared alternative regional trail system concepts;
- Supplemented our field inventory with further discussions with a number of resort owners and operators, trail user groups and communities throughout the Region;
- Identified the strengths and constraints to the development of an integrated regional trail's system and commented thereupon;
- Reviewed a number of relevant, publicly available documents including a submission from area operators for regional funding for an expansion of trails;
- Assembled all of the relevant information, analyzed the data, summarized our findings and developed the recommendations which are set out in this preliminary report which follows.

2.0 GENERAL MARKET CHARACTERISTICS

Prior to assessing the impact of the proposed trail development in the 100 Mile House - 108 Mile House area, we have considered the general factors affecting local conditions, the south Cariboo region, and the provincial market.

2.1 Provincial

The Province of British Columbia, Canada's third largest province and fourth largest economy, is, much like all the non central provinces, heavily dependant for its economic welfare on the health of its resource based industry. During the recession of the mid 1980's, the markets for forestry, mining, fishery and construction suffered dramatic losses. By 1986 growth had increased to 3.5% primarily as a result of EXPO'86. Since that time growth has fluctuated as has unemployment, stability being a sometimes thing.

In contrast however to the changing vagaries of the industrial marketplace, provincial tourism has continued to expand at an ever increasing level beyond the previous $2 billion recorded in 1981. Despite a decline in real growth in 1982 and '83, tourism is an increasingly important contributor to the provincial economy. With tourism revenues cycling between about $3 billion and $3.5 billion between 1986 and '88 and trending to continued improvement the long term outlook is very strong, provided that a continuing variety of tourism destinations are available to meet the full range of tourist interests.

Furthermore, there are increasing strong signs that most levels of government are extending financial and other commitments and support to this burgeoning economic sector of the provincial economy. The industry is being encouraged to expand and upgrade the products being offered, as well as being financially supported for infrastructure planning, development, and implementation including training and marketing. With a committed private sector and sustained support in all forms the future for continuing growth is strong.

In addition to the direct economic factors the province's demographics have begun to change substantially during the 1980's. While the severe economic depression of the early 1980's led to strong out migration, in the latter half of the decade, BC has become a strong magnet for a wide variety of retiring Canadians as well as the base of operations for

a new generation of immigrants from the Pacific Rim countries especially Hong Kong. Both of these trends forebode interesting ramifications for the tourism industry as the population ages more rapidly than the baby boomers but with significant accumulated wealth.

2.2 Regional Overview

The Cariboo regional economy and that of the study area from 99 Mile to the 115 Mile area is comprised mostly of forest industry based businesses including widespread logging. In addition, there are substantial cattle ranching, mining and tourism sectors within this region. With a strong and growing scrutiny of the forestry industry and its practices relative to sustaining the environment, expansion of alternative economic generators is required to assist in stabilizing and strengthening the economy in future years.

With forestry processing concentrated at Williams Lake and 100 Mile House, this industry comprises 8% of the area's experienced labour force. At 100 Mile House forestry related employment accounts for about 18% of the labour force while the service sector provides about 29% . This ratio could increase with the planned construction of an oriented stand board plant by Ainsworth Lumber Company. There is limited mining potential in the area. Cattle ranching is the major activity in the area and expansion is limited by the availability of range land and winter feeding forage. Minor contributions are added by potato and vegetable farming operations in the valleys.

The tourism sector of the area is highly seasonal with some 75% of the year round visitation occurring typically in the summer and fall months. This partially reflects the area's presently limited infrastructure and the resulting inability to increase its market capture of the available year round tourists delivered by the highway system. Highway #97 remains the primary access into the region. As well the completion of the Coquihalla Highway also provides alternative access into the area for the outdoor recreation enthusiast. More recently, the paving of the Duffy Lake road north of Pemberton/Whistler into Lilloett now provides a vastly improved and very scenic alternative route into the Cariboo from the west and could become a factor in promoting increased "circle tour" traffic into the area.

warmer and drier than the remainder of the plateau. Summer and winter temperatures range from 14-16°C and 10-15°C respectively with light annual precipitation of 30-50 centimetres.

In pre-European times, the Shuswap and Chilcotin Indian nations dominated the east and west of the region respectively. Their extensive network of trails as trade routes greatly assisted the early explorers in establishing a profitable fur trading industry. This subsequently gave way to the gold miners of the 1860's and the beginning of the gold rush. Their travel routes were the precursors to the region's current overland transportation network. Ease of access facilitated the development of ranching and later, tourism, initially derived from a rich historical past. The historical legacy of trail development provides a strong framework upon which the objectives of this study are founded and could be used to advantage in the marketing of the region as a unique destination.

2.3 Local Overview

The Study area which includes the Village of 100 Mile House and community of 108 Mile House , is situated in the Williams Lake area of the Cariboo Plateau sub region. One of three sub regions, the plateau, which dominates the area, is a flat to gently rolling, glacial drift covered landform, rising from about 1250 metres. The Fraser River is the only large river, however, there are numerous nearby kettle lakes of various sizes including several larger ones such as Green, Canim, and Horse Lakes. The overall setting of the study area is characterized by rolling, forested hills, large open meadows and fields with picturesque lakes and expansive vistas to distant mountains. However, the area's attractiveness for cross country skiing and snowmobiling is constrained by sometimes unreliable snowfall, mainly at the lower elevations which could impair the sustained potential for increased tourism.

The Study area lies approximately 456 km. north of Vancouver with access along Highway 97. The Study area is centred on 100 Mile House extending a further 15 kilometres to the north to include the 108 - 115 Mile House area **(Map 1)**. Two airports serve the region, although no commercial flights are operating; the 100 Mile House airstrip is 700 metres long at an elevation of 930 metres; another at the 108 Resort which is 1500 metres long at an elevation of 1219 metres. Williams Lake offers the nearest

commercial airport, 75 kilometres north. B.C. Rail offers passenger service between Vancouver and Prince George with scheduled stops in 100 Mile House daily during the summer and three times a week in winter season.

During the 1960's and 70's, the 100 Mile House area enjoyed a surge in growth due to the increasing international demand, at the time, for lumber. However, in recent years the areas population has experienced substantial net out migration due to the closing of the Noranda Mine at Boss Mountain and decreasing lumber sales.

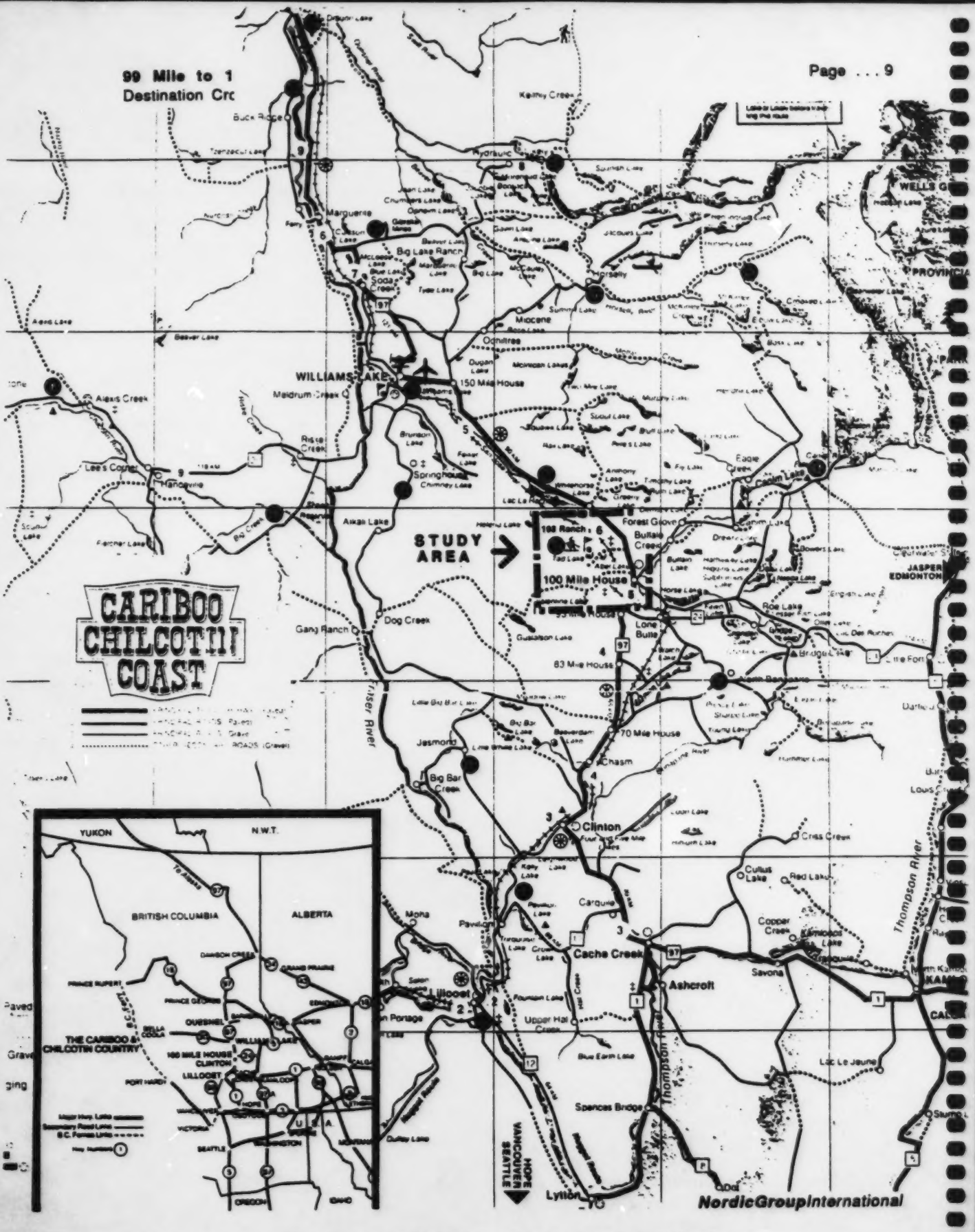
Without employment opportunities to retain the existing skilled workforce and attract new settlement and workers to the area, the forecast for reduction of the local population is certain.

Present population of 100 Mile House is approximately 1700 and the total regional population accounts for 5,800 people. The population is stable, well educated with the majority of residents made up of those under age, 35. The immediate trading area population of the region is approximately 10,000 inhabitants. Further to the north, the area can draw from an expanded population of about 100,000 people primarily from the major centres of Williams lake, Quesnel and Prince George. Approximately one and half hours south-east of the study area is the large interior community of Kamloops.

As a result of existing trail development work in this area and a review of current studies completed within the Cariboo region (i.e. Trailblazer Study, 1991; Commercial Recreation Opportunities Study, 1990), it becomes clear that there are certain specific criteria that must be met in order for individual tourism operators to benefit from any proposed trail development expansion or upgrading. Primary considerations affecting the communities' ability to attract an increased market share are the following:

- Excellent highway access not more than 5 hours from the targeted markets
- High quality support including a full range of lodging, dining, entertainment and related retail services
- Variety of secondary activities and events beyond the primary activity interest

With two highway routes (i.e. Hwy 97 and 124) open to access the area from larger regional centres, including Kamloops, Kelowna, Prince George, Williams Lake and Cache Creek, as well as the lower mainland including Vancouver via the Coquihalla and the more scenic Fraser Canyon Highway , the necessary access to the 100 Mile House area is within the maximum 5 hour time frame for much of the year. However, adverse winter driving conditions can undermine the area's ability to capture market share and needs to be carefully considered to ensure minimal impact.



MAP 1 STUDY AREA LOCATION

2.4 Site Considerations

One of the reasons this area has been identified and developed for Cross Country skiing thus far is the unusual circumstance of having registered rights of way over many of the designated trails in the existing system. Although this has benefited overall trail use and aided in resolving a certain degree of user conflicts (i.e. between motorized / non-motorized users) a number of issues resulting from trail access over freehold land or crown lands still need to be addressed. Several matters have been highlighted below.

LOCAL LAND STATUS:

The 100 Mile - 108 Mile area is unique in Canada, because with the initial development by Block Bros.of the 108 Resort in the early 1970's all the original trails and designated future trail corridors were protected by trail easements. Many of the proposed road developments were designed with extra width to allow for future trail access. In total, the Block Bros. development put in place over 200 kilometres of trails that were specifically planned and laid out for cross country skiing and other seasonal uses at an investment cost of over $2 Million. It is this foresight which has given the area its desire to become a more recognized international destination area for trail use.

CROWN LAND:

While most of the land between 100 Mile and 108 Mile House is privately owned or leased from the crown, the largest area for trail development on crown land is found in the 99 Mile area with an extensive network of roads and trails extending east to Holden Lake and beyond. Most of this area is characterized by a rising benchland approximately 300 metres higher than 100 Mile House and offers greater and more enduring snow cover. However, because the area is managed by BC Forestry, multiple use demands, notably between motorized and non-motorized trail users as well as commercial forestry use must be contended with and can cause some management concerns.

In addition, the Deception/Boss Mountains area in the eastern part of the study area has been identified as a proposed wilderness study area. If approved, trail use if any will likely be limited to low impact uses such as mountain biking, hiking and cross country skiing which are all being considered in this study.

ENVIRONMENTAL ASSESSMENT:

As the current movement to increased environmental awareness can bear negatively even on the beneficial use of a well planned trails system, care must be given to take all necessary steps to avoid things that can both cost or create negative publicity surrounding the proposed trail development. Even though most trail development will be constrained largely to existing routes the merits of environmental evaluation must be considered to maintain the goodwill of the watchers and the users of the network.

LEGAL ISSUES:

A number of legal matters bear interest on potential trail development be it on crown or private lands. These include jurisdictional interpretation, landowner liability and security. Interpretation of land use regulations by Ministry of Forests and their district offices requires firm guidelines setting out the issues of access, quality and maintenance in order to ensure desired cooperation between public users (i.e. recreationists) and industry. Private landowners are increasingly anxious over the potential for liability that they may be exposed to by granting access across their lands. Adjustment of the appropriate laws as is occurring in other jurisdictions (i.e. Ontario) should be supported and encouraged. Landowners' issues of security pertain to increased sensitivity and awareness of the system's trail users. While attention to such legal issues must certainly be taken into account, it should be noted that most of the trails are on private lands and have permanent easements over them which basically outline the permitted uses and legal status. More specific issues will need to be addressed particularily when expanding trail development options on Crown lands as could occur around the 99 Mile trail area.

LOGGING:

While it is clearly recognized that the area's economy is strongly based on the forest industry, greater cooperation and understanding of tourism needs and benefits that could be generated especially within the framework of a year round trail system is required. Most of the large scale active harvesting occurs outside their immediate study area but could affect future, secondary levels of trail development.

Within the study area between 100 Mile and 108 Mile several active logging operations are underway which could influence trail use. Some of these operations follow selective harvesting procedures which can have minimal effect on trail enjoyment if proper procedures and clean up are followed.

These forestry operations can also provide interpretive potential and could be integrated into a much larger scale forestry industry interpretive/education program within the Cariboo region.

Future logging areas must be carefully and thoroughly reviewed with the holders of timber cutting rights to ensure that the proposed trails and existing trails are not negatively impacted at some future time. Similar concerns apply to trails over mining leases.

NATIVE LAND CLAIMS:

Commercial operations on Crown Lands should be the only areas affected by future settlement claims by the 100 Mile House an Williams Lake bands. Care must be given to the locating of long term infrastructure improvements such as lodging and accommodation facilities. Properly addressed these matters should not produce undue concern for developers of these facilities. In fact, opportunities exist for native interests to take an active role in providing trail facilities and services, especially those that build on their heritage and knowledge of the land.

SENSITIVE WILDLIFE WINTER RANGES:

While ski touring and cross country ski trails are unlikely to impose or have any serious impact on wildlife in the region, snowmobiling despite having a significant potential economic benefit has the largest risk for adverse effects on wintering animals, particularly where trails are oriented in close proximity to lower elevations used by the indigenous wildlife. Several winter habitat areas exist within the study area which should be taken into account when projecting trail use and potential trail development or upgrading.

A Cariboo Space Station

3.0 CROSS COUNTRY SKI INDUSTRY EVALUATION

This section provides an overview of current trends or changes evident in the nordic ski industry over the last few years. In particular it provides an update, of sorts, to the B.C. Cross Country Ski Areas Study, (1988), which at the time provided one of the most comprehensive assessments of the sport.

In the intervening years, several on-going studies initiated by B.C. Ministry of Tourism have been conducted for both the skier market and ski area operations. The following provides our assessment of changes within each.

3.1 Changing Profile

While the 1980's saw an impressive growth in Canadian nordic ski participation, estimated to have been between 4.6 and 5 million participants by 1985/86, more recent surveys suggest overall participation has fallen to 3.5 million skiers by 1988 (IST, 1990).

In spite of this drop, profile characteristics of the cross-country skier continue to evolve along the same trends identified in the mid eighties. **Table 3.1**, on the facing page provides a comparison of the skier profile from 1985 to a more current assessment of 1988 and a B.C. profile of 1989/90.

Some of the more encouraging findings indicate that cross country skiing continues to attract an upwardly mobile clientele. Household incomes of $50,000 or more were recorded for 49% of the Canadian skier market. In British Columbia, more than 68% of the respondents to the Bi-Annual Skier Survey indicated incomes between $35,000 - $70,000 (1989/90). This is a dramatic increase from the early 1980's when only 10-17% of participants recorded such incomes. Other trends indicate that more people with professional/management occupations (41%- Canada; 49% - B.C.) remain the primary participants in the sport.

In terms of age, more people in the 24 - 34 age group (34% - Canada) were participants in 1988 compared to 24% in 1985. On the other hand, participation by those 45-50 and older still represents the largest market at 43% for Canada and 58% of B.C.

skiers. While nationally more males are participating (57%), B.C. still indicates a 50/50 split between male/female participation.

In terms of behaviour characteristics, the 1988 Canada Travel Survey indicated the most frequent party size for cross country skiing was one person at 43%, with two people comprising 22% of the market.

Compared to alpine skiers (31%), nordic skiers (40%) tend to travel further one way distances (160 - 319 km) to participate in the sport and the majority show a preference to stay in private cottages (44%) or with friends and relatives (39%) (CTS, 1988).

The mid eighties saw dramatic increased participation in the skating style of skiing, however, it only accounts for an estimated 20-30% of skiers who actively use it. Although cross country skiers in general represent a lower replacement market for new skis compared to alpine, skating has had a minor affect in increasing sales in this area.

Overall, population demographics and current travel research suggest a growing market for trail based recreation activities that will greatly benefit areas such as 100 Mile House. With an ever increasing, aging population, greater awareness towards health and fitness and a growing interest in environmental /outdoor pursuits, participation in activities such as cross country skiing and other trail uses can expect to increase.

Such conclusions are supported by research completed in other provinces such as Ontario which indicate participation rates for trail based activities increasing and ranging from 8% participation (by Ontario residents) in cross country skiing to 56% participation in recreational walking (Ontario Ministry of Environment, 1987).

TABLE 3.1

PROFILE OF NORDIC SKI ENTHUSIAST

	Nordic Ski Enthusiast	Total Canada (General Population) 1985		Total Canada (General Population) 1988	B.C. Profile 1989/90
AGE					
18-24	25%	18%		14%	
25-34	27%	24%		39%	
35-49	30%	25%		20%	
50+	18%	33%		23%	58%
SEX					
Male	53%	49%		57%	50%
Female	47%	51%		43%	50%
MARITAL STATUS					
Married	62%	65%			61%
Other	38%	35%			
INCOME					
25,000+	62%	48%			
35,000+	42%	28%			68%
50,000+	17%	10%		49%	68%
OCCUPATION					
Professional/Management	19%	12%		41%	49%
Skilled Labour	13%	13%		16%	
Clerical	12%	11%			
Teachers/Sales	9%	6%			
Housewives	15%	18%			
EDUCATION					
Grad. University	17%	10%		46%	53%
Some University	26%	15%			
Grad. College	40%	20%			
WHERE THEY ORIGINATE (Population)					
Atlantic Canada	4%	(104,280)	9%		
Quebec	49%	(1,277,430)	27%		
Ontario	30%	(782,100)	36%		
Man./Sask.	4%	(104,280)	8%		
Alberta	7%	(182,490)	9%		9%
B.C.	6%	(156,420)	12%		81%
U.S.					4%

3.1.1 B.C. Skier

Based on the comprehensive B.C. Cross Country Survey compiled by Ministry of Tourism 1989/90, a more specific profile of the B.C. cross country skier can be provided. Table 3.1 summarizes some key characteristics which reflect that the B.C. skier is more affluent, better educated and holds more professional employment than in earlier years and compared to the National average.

Of those surveyed, 31% were entry level skiers, 46% intermediate and 23% advanced. The main reasons for skiing remain to be "out of doors" (53%) or "to exercise" (30%). B.C. skiers on average tend to ski more days per year (13-30) which is an increase from 12-54 in 1985/86.

More skiers (74%) are taking overnight trips and do so approx. 2.4 times per year. Each trip averages 2.6 days. When travelling on an overnight trip, 45% prefer to stay in commercial lodging nearest the ski area.

Interestingly, the most recent survey (1989/90) indicates fewer people (52%) are using day passes compared to 70% in 1985/86. 25% of skiers now rent equipment upon their arrival at the ski area.

In terms of selecting a ski area to ski, the most frequently cited factor (30%) was the area's reputation as "best place to ski in the region". Word of mouth (38%) and brochures (22%) remain the most widely used sources of information that skiers use in planning trips.

Private vehicles remain the most frequently used transportation (68%) for skiers to reach ski areas. Most trips (65%) are taken during February/March and the majority of trip arrangements (77%) are made directly by the skiers.

In terms of product satisfaction, services and accommodation staff were most often rated by skiers as being very good (37% and 51% respectively).

Of interest is the fact that the most frequently cited improvements to ski areas was the need for **increased terrain** (38%) and **groomed trails** (38%).

Although the total number of cross country skiers in B.C. has not recently been determined (the latest estimate was 325,000 in 1987), current projections suggest 360,000 participants by 1990/91. It is interesting to note that in 1985/86, 94% of skiers surveyed, originated in B.C. but by 1989/90 only 80% do so, indicating a larger share of "out -of-province" skiers coming to B.C. and a greater spread from other regions of the province.

This is exemplified by the fact that the majority of B.C. skiers originated in Vancouver (55%) in 1985/86 but by 1989/90 this figure had dropped to 32%, with skiers from Vancouver Island accounting the highest percentage of origin at 35%.

3.1.2 U.S. Market

Many of the socio-economic factors which have changed the Canadian skier profile are evident in the U.S. as well.

However, the most interesting factor to note is that by 1989/90 total participation had increased to 5.1 million skiers (NSGA, 1990) from earlier year estimates of 4.5 million participants and the average frequency of participation had increased to 7.2 days per year. **Figures 3.1 - 3.6** illustrate some of the major profile characteristics.

It is estimated that B.C's primary market located in the Pacific/Northwest region of the United States (i.e Washington, Oregon, California) saw a slight increase in overall participants rising from about 15% to 18 - 19% representing about 943,000 skiers by 1989/90 (NSGA, 1990,; NGI)

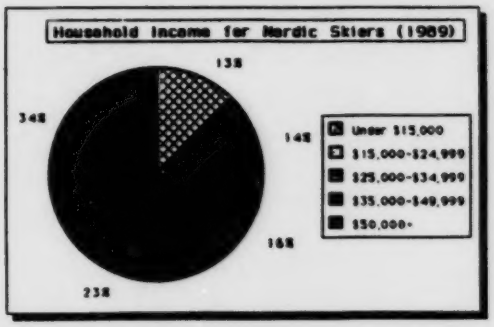
Also of interest is the fact that while some ski areas are experiencing a 20-30% cross-over from alpine to cross country skiing participation, (i.e., Mt. Bachelor, Royal Gorge) the 1990 NSGA survey suggests overall only 13% are doing so.

FIGURES 3.1 TO 3.6

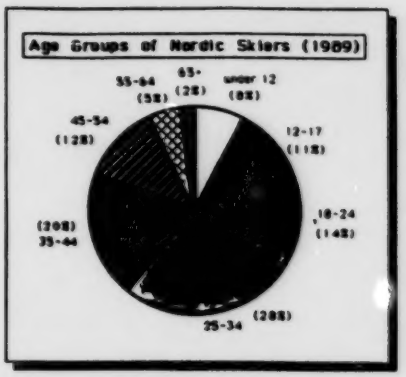
U.S. NORDIC SKIER PROFILES (1989)

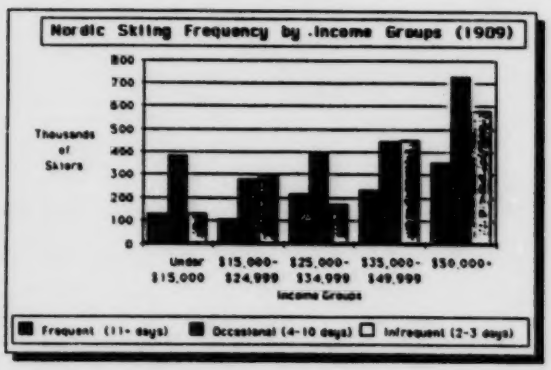
(NSGA, ASI)

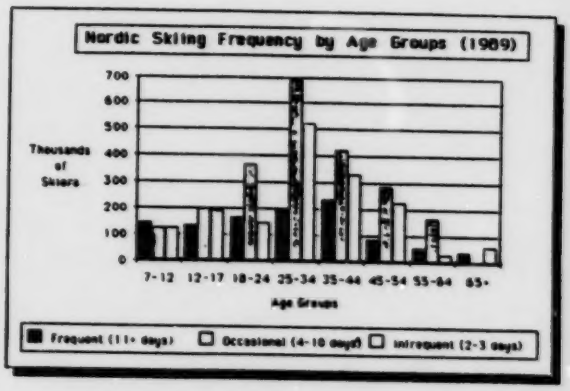
NORDIC SKIERS' INCOME



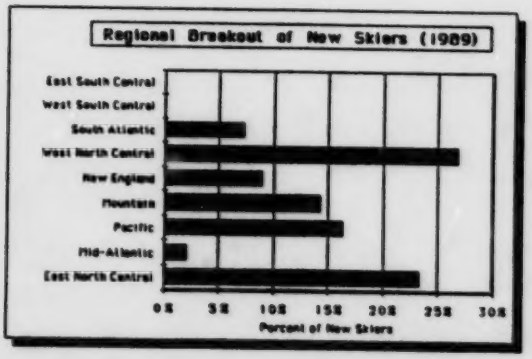
NORDIC SKIERS' AGE

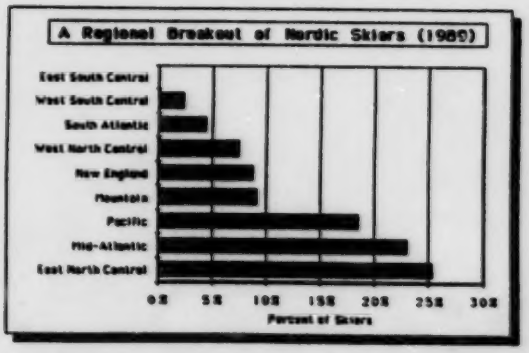






PARTICIPATION by GEOGRAPHIC REGION





The following graphs have been assembled by Nordic Group International based on information obtained by National Sporting Goods Association.

Note: A participant is defined as someone seven years of age or older who plays a sport more than once within the year.

Tourism British Columbia
NordicGroupInternational

In terms of new skiers, the West North Central and East North Central regions of the US saw the greatest increase (27% to 23% respectively) in participation.

3.1.3 Profile Changes Summary

While cross-country skiing is clearly maintaining its winter appeal, our assessment of skier profiles indicates some significant changes in participation; none the least of which reflects a downturn in overall participant numbers.

Some of the reasons affecting this shift can no doubt be related to the recent economic recession, the Gulf War and inconsistent snow cover across many parts of the Canadian/American snow belt regions.

In spite of the drop in overall skiers, those that remain continue to show more affluent lifestyles and are willing to travel to participate in the sport.

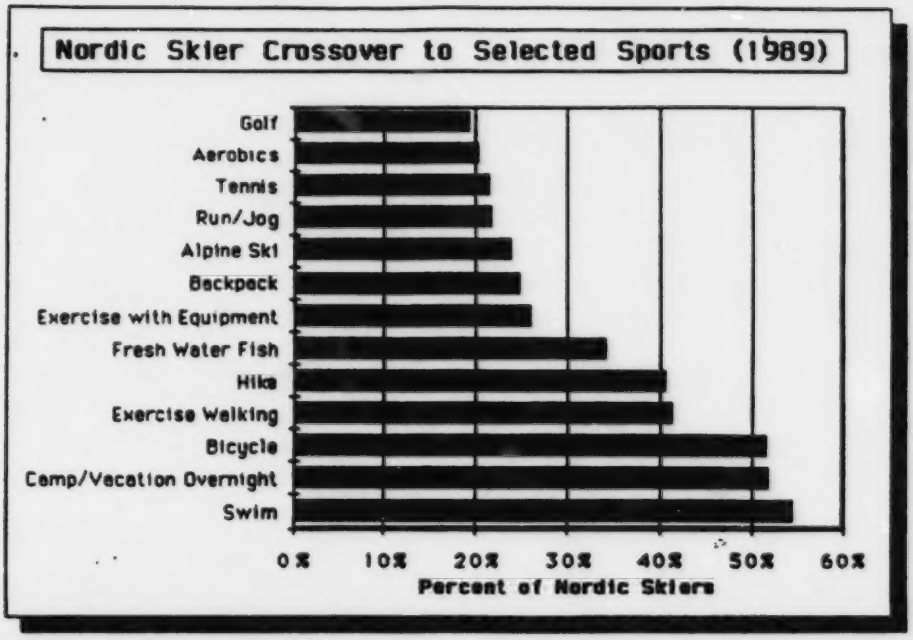
As predicted in earlier studies, our overall population base is aging but is in better health. The appeal of outdoor sports and increased health benefits should continue to attract a large segment of this market to participate in cross country skiing... **if the product meets their needs.**

As in the past, cross country skiers remain a discerning group , and while the hardy outdoor type is still accounted for, the trend to greater sophistication and attraction to quality ski facilities and services has become the primary characteristic of this group similar to that evidenced in the alpine ski sector years ago.

Cross country skiers are continuing to spend increased amounts on skis and ski clothing or related equipment. Deals can still be had on beginner sets (i.e., $100) but most cross country ski packages now average $200- $300). As shown in **Figure 3.7,** cross country skiers also exhibit a diverse range of interests in other outdoor sports demonstrating the wide cross over marketing opportunities that could be encouraged with any trail related development.

FIGURE 3.7

NORDIC SKIER CROSSOVER SPORTING INTERESTS



The following graph has been assembled by Nordic Group International based on information obtained by National Sporting Goods Association.

Note: A participant is defined as someone seven years of age or older who plays a sport more than once within the year for all sports with the exception of Aerobic Exercising, Bicycle Riding, Exercising with Equipment, Exercise Walking, Running/Jogging and Swimming. (Participation for these six sports is defined as at least six times.)

Overall characteristics of cross country skiers remain as a family oriented sport. However, there are greater demands being put on leisure time with participants opting for shorter "mini trips" rather than long vacations.

However, the overall shifts towards an aging population having greater awareness towards health and fitness, the outdoors and environmental pursuits will aid in ensuring continued growth in this activity although not at the level previously seen in the early eighties.

Tourism British Columbia
NordicGroupInternational

In order to succeed, trail systems and their related ski businesses will have to cooperatively target those well defined specialized markets having the profiles suited to their specific products and services (IST, 1990). Development and maintenance of a professional image and enhanced marketing programs will be crucial to both attracting and expanding the interest of these markets.

3.2 Ski Area Evaluation

As with the skier, shifting demand and market patterns have caused changes to occur with the development of ski areas as well.

Typically, cross country ski areas still represent a diverse range of operations from small "mom and pop" operations (having few trails, irregular grooming using homemade equipment) to large, commercially driven enterprises including Mt. Bachelor, Oregon (50 Kms of trails; 40,000+ annual visitors, $8/day trail fees) and Royal Gorge, California which continues to be an industry leader in breaking records or advancing changes that improve/expand the skier product. This area now boasts over 400 kilometres of trails, has a $16 / day trail fee and still attracts over 120,000 (paying) skier visits (1990/91).

The most reliable indicator of cross country ski area developments in North America remains the annual CROSS COUNTRY SKI AREAS OPERATIONS Survey completed by NGI (Bozeman, MT). **Table 3.2**, provides a summary indicating the key changes in operations between 1985/86 and 1989/90 (the most recently completed survey). The survey is based on a sample drawn from over 300 commercial ski area operations and is useful to identify how owners and operators are responding to skier demands.

Overall, the average number of annual visits continues to increase at most areas rising from 6100 skiers/yr. to 7,078/yr. by 1989/90. Trail fees of at least $6 per day are commonly in place at 93% of all commercial ski centres as more areas come to recognize the costs of operating as well as identifying additional revenue opportunities that help make the business more viable. While an increase is evident in the number of day use areas (52%), destination resorts still represent 1/3 of the operations. The day use fee is also increasing and can be expected to continue doing so in the near future.

One of the major influences seen in the 1989/90 survey is the effect that inconsistent snow is having on an area's closing. Lack of snow is now accounting for 66% of early closure compared to 45% in 1985/86. Variable snow conditions have had devastating effects in key market areas in the United States with many New England operators and several California areas closing completely.

Interestingly, the 1990/91 season caused most managers to remain sanguine about the future because where there was snow, there was solid growth in such areas as; Sunday River, ME, Solitude Nordic, UT, and Boyne Nordican, MI.

As can be seen, there is a slight increase in the number of cross country centres moving to snowmaking. A recent USIA task force concluded that the technology is certainly there, it only needs to be made cost effective and flexible enough to apply to varied locations (Wiesel, 1991). The cost and complexity of snowmaking continues to intimidate some operators, but facing no snow alternatives and witnessing success stories like Mountain Top (VT), Temple Mountain (NH) and Royal Gorge (CA) are helping to convince reluctant operators.

In Canada, Hardwood Hills Ski Area, one hour north of Toronto, has become the first serious entrant into the cross country snowmaking market by installing a $200,000 system for a 3 km loop. The system proved itself in the first season by making snow for a major pre-Christmas Race, which otherwise could not have been held, due to lack of snow.

Another trend evident at cross country ski areas as an alternative to installing snowmaking is the dramatic UPGRADING of trails by improving surface and drainage conditions, widening trails for skating and relocating trails to sun protected areas. Results from such improvements have permitted some areas like Tahoe Donner, CA, to **set track in six inches** of dense snow and offer good skating on four inches of snow depth.

The survey also indicates the continuing shift at many cross country ski areas to larger snow groomers that permit more efficient and faster groomer with appropriate snow cover. Interestingly, however, in view of the diminishing snow levels in many areas is the resurgence of the snowmobile as a grooming vehicle. (See page 24 for additional details.)

TABLE 3.2
PRODUCT ANALYSIS

		1988 B.C. Nordic Ski Assessment	CCSAA Survey 1985/1986	CCSAA Survey 1989/1990
I.	**Area Description**			
1.	Type of Classification:			
	Alpine Affiliated	42%	37%	n/a
	Guest Ranch	29%	10%	n/a
	Other (Lodge, etc.)	29%	45%	n/a
2.	Type of Operation:			
	a) Day use	22%	45%	52%
	b) Destination	44%	37%	38%
	c) Weekend only	33%	18%	10%
3.	Commenced Operations	N/A	35%	50%
4.	Reason for Closure:			
	a) Lack of snow	40%	45%	66%
	b) Lack of clients	25%	40%	17%
	c) Preset date	35%	15%	17%
II.	**Trails & Grooming**			
1.	a) # of kms. groomed (average)	33 km	29 km	33 km
	b) Night skiing	15%	25%	26%
	c) Snowmaking	0%	3%	8%
2.	Groom for ski-skating:	45%	58%	89%
3.	Snowmobile conflicts:	45%	37%	34%
4.	Grooming equipment:			
	Snowmobiles	70%	78%	80%
	Snowcats	35%	54%	69%
5.	Grooming methods:			
	a) All trails daily	10%	17%	18%
	b) Some trails daily	20%	28%	37%
	c) After each storm	42%	17%	26%
	d) For weekends	4%	16%	8%
	e) With skier deterioration	24%	22%	7%
		100%	100%	100%
III.	**Facilities**			
1.	Nordic Staging (Base) Facility:	36%	97%	97%
2.	Facilities/Services:			
	Rental	75%	97%	90%
	Retail	47%	86%	72%
	Ski School	57%	89%	84%
	Child Care	46%	48%	26%
	Food Service	72%	99%	85%
	Bar Service	55%	70%	37%
3.	Other Activities:			
	Alpine	44%	42%	28%
	Ice Skating	55%	32%	30%
	Sledding	46%	31%	22%
	Snowmobiling	18%	19%	11%
	Dog Sledding	22%	6%	5%
	Sleigh Rides	30%	33%	28%
	Sauna/Hot Tubs	55%	48%	35%
IV.	**Marketing**			
1.	Origin of clientele:			
	0 - 49 km.	15%	16%	30%
	50 - 99 km.	0%	10%	20%
	100 - 149 km.	15%	25%	23%
	150+ km.	70%	49%	27%
2.	Most effective paid advertising:			
	Brochures/Maps	45%	30%	40%
V.	**Visitation**			
1.	Average # of visits	4,500	6,100	7,071
2.	Trail fees (yes)	33%	84%	93%
VI.	**Expansion**			
1.	5 year plan in effect: Yes	70%	40%	n/a
2.	Planned trail expansion: Yes	45%	60%	56%

In low snow, or during early season the lighter sized doubletracks or long tracks can still provide adequate grooming where larger machines would damage and reduce the snowpack. The growing interest in snowmobile use has also been augmented by the increased range of specially designed snowmobile grooming attachments which previously were limited or non-existent.

In terms of services and programs some interesting observations can be made. Despite a general appearance of providing "balanced" facilities, many areas continue to lack such amenities as child care whereas the demographics clearly suggest a high proportion of families (SIA/CCSAA, 1990) and women with children who participate in skiing.

Some areas are beginning to target children skiers via school groups which serves to cultivate the possible creation of "lifetime skiers" (if their early experiences are fun and done on quality trails). Hardwood Hills in Ontario is working strongly with local school boards in designing both winter and non-winter curriculums that utilizes their extensive trail system for both sport training and instruction as well as outdoor education. The seniors market, particularly groups such as Elderhostel, are increasingly being tapped. Surprisingly, only a small number of survey respondents (32%) are targeting the women's market although 50% of participants are female.

In terms of programming, the latest season saw a trend to most areas holding more **fun** and recreational ski events rather than competitive events. Some areas which specialize in competitive ski training and have challenging, highly developed FIS rated trails, such as Hardwood Hills, do extremely well with competitive events and are registered to host their 2nd World Cup Race in early 1992.

Of major concern for many ski area operators, and overriding other factors such as a weak economy or poor snow remains the growing competition in the provision of cross country ski trails by federal, provincial and municipal agencies offering free groomed trails. If cross country skiing is going to develop into a more significant winter tourism attraction, these agencies must recognize the same principles as applied to the alpine ski sector, where no free alpine skiing is offered.

Costs are continuing to rise in terms of grooming equipment requirements, trail maintenance and tracksetting and the user has to be made aware of that in order to justify paying a trail fee. One trend that does appear evident is that several Canadian municipalities are moving to cross country track fees.

According to the 1989/90 ski area operators survey, trail fees accounted for 38% of the revenue among respondents. Rental and retail sales contributed a further 33% of revenue. The Christmas holiday period remains a critical factor in determining whether an area will make a profit or not and accounts for almost 23% of total gross revenues for the ski season by survey respondents.

It clearly shows that cross country skiing remains an elusive business when not clearly defined and made available in an attractive and pleasing manner since the cross country skier represents a more discerning market that is more difficult to motivate than their downhill counterparts. Similarly, while developments do not require the large capital investment of alpine skiing, they also do not generate revenues like downhill skiing.

On the other hand, the sport clearly attracts a certain "lifestyle" and if the product and services are developed to meet the market needs, cross country skiing can certainly be an effective *catalyst* to generating increased winter revenues. But this will occur only by providing a **full mix** of opportunities, programs, services and trail experiences and **not relying on trail fees** as the only major source of revenue.

3.2.1 B.C. Ski Area Update

While the foregoing has provided a general overview of changes within the North American ski area market, Table 3.2 also illustrates how B.C's cross country ski areas fared based on the 1988 B.C. Cross Country Ski Study.

Although significant changes have occurred in the development of B.C's nordic ski areas and in the marketing of cross country skiing in B.C. both by the operators and the Ministry of Tourism, the industry still faces some challenges particularily in providing a more sophisticated product and a wider range of services and programs that increase the overall appeal of the sport.

The most recent B.C. Ski Area Guide (1990) identifies 42 areas as offering a nordic ski experience of which 40 offer groomed trails totalling approx. 1700 km. In 1988 only 35 areas were listed with total length of trails at less than 1400 km.

Table 3.3 summarizes the results of B.C's Annual Ski Area Operators Survey representing 26 of the largest and more active commercial operations. Overall skier visits were down by 10% in 1989/90 over the previous year, yet skier revenue increased by over 70% and revenue per skier increased by 90% to $21.50.

As indicated earlier, the market origin of B.C's cross country skiers is shifting from B.C. residents to those from the rest of Canada (24%) and international (14%, including the U.S. and off-shore).

While the Cariboo and Okanagan regions continue to attract the majority of "destination" skiers, day use ski areas such as Cypress Bowl/Hollyburn Ridge near Vancouver are attracting the majority of **total B.C. commercial cross country skier visits.** Discussions with ski enthusiasts however, indicate that the trails at Cypress have lost their former charm in order to accommodate the large number of skiers and in spite of the upgrading are still crowded.

Several areas, especially those affiliated with alpine skiing are aggressively increasing their cross country skier profile. Silver Star Resort has undertaken extensive trail improvements and expansion as well as getting their trail homologated for FIS sanctioned events and has positioned itself as a training centre for competitive skiers. Lac le Jeune Ski Area has added new accommodations and upgraded their grooming equipment while continuing to attract a strong regional market from Kamloops as well as U.S. destination skiers.

The B.C. skier survey indicates nordic skiers are generally more satisfied with an area's staff than with facilities and services.

In addition, many of B.C's cross country ski areas remain closely associated with "resorts" offering non-winter activities such as; guest ranches, golfing, fishing and health/fitness opportunities.

If the 100 Mile - 108 Mile House area is to clearly establish itself as a true destination cross country ski resort area, it must implement the proposed modifications to the existing ski product including the necessary improvements to its physical setting (i.e trails). As well the overall development program and marketing strategy must provide a new focus to increase market appeal.

TABLE 3.3
B.C. CROSS COUNTRY OPERATORS SURVEY

	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90
# of Visits	**132,886**	**126,488**	**109,651**	**140,738**	**130,359**	**117,424**
Skier Revenue ($ 000's)	. 985	1.125	1.160	1.516	1.472	2.528
Revenue/Skier ($)	7.42	8.9	10.5	10.77	11.29	21.50
Season	126	114	120	103	124	105
# of Beds	2264	1818	2014	4023	2571	3472
Occupancy		48	49	59.5	41	51
Market Origin: (%)						
British Columbia	85.2	87.4	88.3	72.17	81	63
Canada	6.8	8.0	4.9	18.5	9	24
International	8	4.6	6.8	12.64	11	14

OVERALL SUMMARY OF SURVEY

In summary, the combined results for the ski areas indicatEs that the 1989/90 ski season generated a total of 3.44 million skier days and over $100 million in gross revenues for the resort business directly invloved in skiing. Employment was about 4200 people on a full time basis with payroll at more than $44 million. New investment is expected to exceed $51 million.

It is interesting to note that as skier revenue has increased that there has been an overall increase in the five year average of Canadian and International visits which would tend to at least partially explain the year over year changes between 1987 and 1990.

3.3 Summary / Conclusions

In reviewing current changes within the cross country ski area development field it becomes clear that to be successful operators will have to look at diversifying their product aimed at specific markets. Most ***successful*** cross country operations appear to attract between 25-40,000 skier visits per year. Some, like Mt. Bachelor or Royal Gorge attract over 75,000. Cypress Bowl near Vancouver attracts almost all B.C.'s commercial cross country skiers (i.e. over 80,000 skier visits in 1990/91).

As in our earlier assessment of B.C's cross country ski industry the parameters establishing a successful cross country ski operation remain largely the same as in 1988.

- carefully planned, well built trail systems offering diversity of experiences, a range of opportunities, and most of all a memorable quality
- a full range of complimentary services including rental, retail, instruction, guiding, etc.
- if it is a destination area; comfortable, clean accommodations and good food plus a variety of activities for those not skiing
- greater emphasis on programming and combining the participation in cross country skiing with other complimentary activities such as; outdoor adventure, interpretive study, historical study, etc. People are interested in learning about the areas they visit. Trails that offer opportunities for learning will be more interesting to ski.
- areas should offer opportunities for other winter recreation activities including; snowshoeing (but make it fun and a learning experience), dogsledding, sleigh rides, snowcoach tours, and if not enough snow, winter mountain biking or in the Cariboo, horse riding.

In addition, it is now evident that with fluctuating snow conditions, major cross country ski areas will have to look at either improving their trails to do better with less snow, or move to snowmaking technology, or both. Cross country has got to follow examples set by the alpine industry. No longer is it tenable to offer only a simple trail system and basic amenities. People want **fun**, plain and simple. They want to be entertained and enjoy pleasant surroundings and amenities. It is our estimation that cross country skiing can be the catalyst to attract a wide ranging winter market, if the diversity of products and services are made attractive enough. Areas like 100 Mile - 108 Mile House that can "package" a diverse mix of trail and accommodation opportunities should be able to do well in attracting the destination skier.

4.0 MARKET ANALYSIS

In order that the development of a regional cross country ski trail system meet the needs of its principal users, some discussion of who these users might be and both the seasonal demand strength and future growth prospects of winter visitors to the area are necessary. This process also assists us in determining the economic support for the project to be developed. Conclusions drawn from such discussion can ultimately become the foundation for developing an effective marketing plan able to attract a fair share of the markets available to the area.

4.1 Provincial Tourism Overview

Tourism, the largest employer in the Province of British Columbia is also now considered to be the second most important economic industry in British Columbia, behind forestry. Overall, provincial tourism revenues have increased from $3.2 billion in 1986 to $4.6 billion by 1990 showing a dramatic 28% increase following Expo 86 and tapering down to a 12% annual growth in subsequent years. **Table 4.1** provides an overview of the key tourism industry benchmarks for 1987, 1989 and 1991 (estimated)

Non Resident visitors outnumber resident visitors by a ratio of 55% to 45% and accounted for $2.4 billion in revenues in 1989. The average length of stay of the non resident tourist was 5.83 nights. International visitors tended to stay longer at 8.4 nights while Washingtonians averaged the shortest trips at 3.2 nights. Average party size of visitors was 2.47 people with an expenditure of $54.90 per person/day. By comparison, **resident** B.C. tourists exhibit an average length of stay of 4.0 days, have slightly larger party size of 2.9 people and spend a little more per day per person ($58.90).

Trends in the market over the last ten years include:

- decrease in the number of nights from 6.10 to 5.84
- British Columbia has realized a major increase (20%) in the attraction of American visitors, particularly as a result of Expo 86
- person trips by Canadians has decreased 10%
- use of motels has reduced from 30% to 18%
- there has been a 15.5 % increase in overnight travellers within the province between 1986 and 1988.

4.1.1 Non resident visitors:

- 7.63 million person trips were made in British Columbia in 1989 and the principal sources of visitors to the province were as follows:

Alberta	23%
Ontario	13%
Other Canada	12%
Washington	14%
California	9%
Oregon	4%
Other U. S. markets	15%
Overseas	10%

- British Columbia's primary non resident market are non-resident Canadians at 48%, followed closely by the U.S.A. which accounted for 42% of all visitor parties in 1989, an increase of 31% over 1986 levels;

Tourism British Columbia
NordicGroupInternational

TOURISM INDUSTRY BENCHMARKS BY REGION

1989 DATA

Table 4.1

Tourist Region	Total	S/W B.C.	V.I.	Rock	O-S	H.C.	N/NW	KC	CC-C	PR
Total Expenditures - $Billion	4.60	1.98	0.72	0.25	0.18	0.18	0.14	0.04	0.04	0.07
Percentage	100%	55%	20%	7%	5%	5%	4%	1%	1%	2%
Total Visitors - All Classifications (000's)	20,674	7,631	4,197	1,908	1,717	1,526	763	382	382	382
Percentage	100%	48%	19%	9%	8%	6%	4%	2%	2%	2%
Non-Resident Parties										
Length of Stay	5.8									
Party Size	2.5									
Numbers (000's)	7,630	3,662	1,450	687	610	458	305	153	153	153
Expenditure $54.90 daily ($million)	2,400	1,320	480	168	120	120	96	24	24	48
Resident Parties										
Length of Stay	4.0									
Party Size	2.9									
Numbers (000's)	6,664	3,199	1,266	600	533	400	267	133	133	133
Expenditure $58.90 daily ($million)	1,569	863	314	110	78	78	63	16	16	31
Excursionists										
Length of Stay	1.0									
Party Size	2.5									
Numbers (000's)	2,100	1,008	399	189	168	126	84	42	42	42
Expenditures $37.15 daily ($million)	46	25	9	3	2	2	2	0	0	1

LEGEND:

TOTAL	=	PROVINCE OF B.C.	H.C.	=	HIGH COUNTRY
S/W BC	=	SOUTWESTERN BRITISH COLUMBIA	N/NW	=	NORTH BY NORTHWEST
VI	=	VANCOUVER ISLAND	KC	=	KOOTENAY COUNTRY
ROCK	=	B.C. ROCKIES	CC-C	=	CARIBOO CHILCOTIN - COAST
O-S	=	OKANAGAN SIMILKAMEEN	PR	=	PEACE RIVER

- The Ontario and International markets have increased significantly in importance, with revenues from these areas now contributing 22% and 15% respectively, ranking first and third, with Alberta second, at 18%;

- In total, the first quarter accounted for 17.8% of year round travel, second quarter 24.6%, third quarter 38.4% and fourth quarter 19.2%. **(Table 4.2)**

The relative strengths of the first and fourth quarters compared to previous years' statistics reflects the province's successful marketing efforts in the winter ski business, of particular importance to the project under study.

TABLE 4.2

SEASONALITY OF PRINCIPAL VISITOR TRAVEL

Quarter %	Wash	Canada	Alberta	Ontario	O'seas	TOTAL %
First	15	12	21	13	13	17.8
Second	11	8	22	10	10	24.6
Third	15	14	21	14	9	38.4
Fourth	15	16	30	17	10	19.2

Transportation:

The principal mode of transportation for all market segments was automobile at 44%, followed closely by air travel at 42%. The latter indicates the increasing prominence of non resident visitors from Ontario and Eastern Canada in general. Automobile transportation continues to be the preferred mode of travel for visitors from the U.S and B.C. with B.C. residents choosing auto 75% of the time, Washington State at 95% and Californians 70%.

Tourist demographics:

B.C. residents (46.2%), Albertans (23.0%), residents of Washington State (14.0%) and Ontario (13.0%), represent the major year round visitor markets.

15% of Albertans indicated that their main purpose was a resort vacation, with 9% recording an outdoors trip with an average length of stay of 5.9 days. Albertans spend more time in more regions of the province than do residents of other parts of Canada, with 46% spent in the three tourism regions east of the Cariboo, combined. 74% of Albertan visitors arrive by road, with motels, hotels and resorts preferred by 31% of travellers. 51% of visitor travel in the first and fourth quarters is accounted for by Albertans, with Alberta visitors typically consisting of adults with children (23%) or as adult couples (42%).

While Ontarians spend more than most other visitors, with longer average stays of 7.8 days, their tendency to stay in urban centres makes them a relatively difficult market to penetrate for a trails experience in the Cariboo.

Visitors from other parts of Canada visit other regions of the province more than residents of Ontario, but less than Albertans, with 35% preferring commercial accommodations behind the homes of friends and relatives. A total of 19% was on either a touring or resort vacation, with 28% of visitors into B.C. in the first and fourth quarters coming from other parts of Canada.

By contrast, Washington State residents have a preference for touring trips, followed by outdoors' experiences and resort vacations, at 25%, 11% and 11% respectively. While this segment accounts for only 4% of visitor expenditures, with relatively short lengths of stay, at 3.2 nights, it accounts for 30% of visitors to the province in the periods January through March, and October through December. The majority arrive by road, with 45% choosing motels or campgrounds.

50% of residents of Oregon are interested in either a touring or outdoors' adventure trip. 93% arrived by road, but only 4% of our first and fourth quarter travel was accounted for by Oregonians. Despite this, these visitors represent good

potential for a trails' experience, with 38% selecting motel, hotel or resorts as their preferred accommodation.

Visitors from other U.S. and Western U.S. states in particular, represent an increasingly important source of year round tourist activity for B.C. These segments show the greatest propensity to use commercial accommodation, with 56% and 48% respectively choosing motel, hotel or resort accommodation. They account for approximately 12% of travel into the province during the first and fourth quarters, with 8-10% and 3-5% respectively indicating an outdoors/adventure trip and resort vacation as the main purpose of their trip. 58% of "other" states visitors indicated that this was their first visit to B.C. Accordingly, they had a higher propensity to choose a package tour, more than twice as often as for visitors from other regions.

The most popular destinations for International visitors were Greater Vancouver, Vancouver Island and other parts of Southwestern B.C., accounting for 65% of travel in 1989. Overseas visitors also account for 26% of non resident travel into the province during the first and fourth quarters, with outdoors/wilderness experiences and resort vacations comprising the main purpose of their trips 8% of the time, on a year round basis. Significantly, most U.S. visitors are "repeats" at almost 90% of all visits from anywhere in the world. Washington visitors to BC have a 79% repeat factor.

Visitor profiles reviewed indicate that some 55% of visitors are males ranging from below 35 years of age to the mid to high 40's, the latter representing a principle market for Canada's resort properties. With incomes ranging from the $25,000.00 through $40,000.00 to $57,000.00 per year mark, those above $40,000.00 are considered to represent prime target markets for destination resorts.

Purpose of Trip

Of interest is that 8% of non resident visitors came for an outdoors, wilderness, or adventure trip, with visitors from Washington State and Oregon

being most likely to take this kind of trip, at 11% and 15% respectively. Table 4.3 provides a summary of the primary reasons for travel by visitors.

TABLE 4.3
REASON FOR TRAVEL - NON-RESIDENT VISITORS

Conference, meeting, trade show	6.1%
Other business	10.6%
Visiting friends and personal matters	33.2%
Touring	26.9%
City trip	3.0%
Outdoors and adventure	7.8%
Resort, cruise, theme park, exhibit	12.4%

Preferred activities participated in by non resident visitors have been listed in Table 4.4 in which outdoor related activities accounted for 33% participation, including skiing at 4%. A comprehensive list of variations by season is included in the appendix.

4.1.2 Resident Visitors

- These accounted for 15.6 million person trips within the province in 1989, representing 67% of total visitor volume, but only 52% of revenues. Average stay was smaller than for non resident visitors, at 3.7 nights;

- Propensity to travel was strongest in the third quarter at 55%, followed by the second and fourth at 42%, with the period January through March recording the lowest, at 41%;

- 55% of all travel is generated by the residents of Southwestern B.C., reflecting its populous nature, followed by residents of Vancouver Island at 18.4% representing some 4.1 million person trips;

- 77% of all trips are made for pleasure, generating $4.5 billion, 68% of resident travel expenditures;

- The Survey of Residents travelling in British Columbia clearly demonstrates the importance of local travel of residents within their own region;

TABLE 4.4
Preferred Activities - Non Residents

ACTIVITIES

- Participating in outdoor activities involved at least 43% of the visitors to this region; an additional 22% reported spending time at the lakeshore.

- While as many as 33% indicated they went sightseeing and 7% took a tour; another 33% said they were just "passing through". The latter represent a potential market that can be persuaded to stay longer in the region if they are made aware of the attractions and activities available.

Activities (Parties)

	Region %	Province %
Attended		
Conference/Convention	0	2
Corp. Meeting	1	2
Trade Show	2	0
Sporting Event	4	2
Festival/Cultural	2	5
Other	0	1
Activities		
Went Shopping	20	36
Took a Tour	7	9
Sightseeing	33	42
Passing Through	33	17
Conduct Business	5	10
Other Outdoor	43	23
Skiing	0	4
Other Sporting	13	12
Nightlife	1	11
Other	3	2
Visited		
Beach/Lakeshore Activities	22	21
Museum/Historic	15	14
Fair/Amusement Park	1	3
Gardens/Parks	9	20
Friends & Relatives	23	37
Other	3	2

Note: respondents could answer more than one activity

- 18% of all year round resident travel was for outdoors/wilderness trips, (2.8 million). This was strongest in the 2nd quarter at 30%, and 23% in the 3rd quarter. Winter and spring outdoor trips were 9% and 17% respectively

- Motels and hotels were preferred by 24% and 17% of residents respectively, with winter and spring accommodation under these categories the same as year round averages for motels, and a range of between 14%-19% for hotels, for winter and spring periods;
- There is a correlation between household incomes and certain types of accommodation selected, with 27% of visitors having incomes over $60,000.00 using hotels. This correlation also exists for the choice of resorts by a relatively higher percentage of high income earners (7%). While there is some indication that the choice of motel accommodation is partly a function of increasing income levels, this appears to occur mainly in middle income earning brackets. Presumably, as incomes reach into the highest ranges, preferences for hotels over motels start evidencing themselves;

- B.C. residents made 32.7 million excursion trips in 1989. These are trips involving travel of 50 kilometres or more for pleasure or personal reasons, but exclude an overnight stay;

- Seasonally, the fall and winter account for 30% and 36% of excursion trips, with outdoors/wilderness the main purpose for 12% of visitors.

4.2 Tourism in the Cariboo-Chilcotin

The area under study is located in the Cariboo sub region of the Cariboo Chilcotin tourism region of British Columbia. In 1989, visitor surveys of both resident and non resident visitors to the sub region were conducted. Key aspects of these studies relevant to our work have been summarized in this section.

At present the visitor markets to the Cariboo Region are divided between 55% non resident (out of province) and 45% resident and excursionist visitors (**Table 4.5**).

During 1989, Tourism B.C. reported that 123,600 non resident visitor parties travelled to the Cariboo Region on their vacations. Tourism expenditures by non residents totalled some $24 million which represents about 1% of the total tourism revenues generated in B.C..

The average party size was 2.54 people, length of stay, 2.47 days and expenditures were $34.80 per person per day. This expenditure is low compared with what visitors in other regions of the province are spending, on average.

British Columbia resident visitors to the Cariboo totalled 101,400 parties or 257,600 visitors. The majority of domestic visitors travelled to the region by their own vehicles (83%, TIDSA, 1980). The following summarizes some of the key characteristics of resident and non-resident visitors to the Cariboo based on recent tourism surveys.

4.2.1 Non Resident - Resident Travel , 1989

- While Southwestern British Columbia has significantly improved its share of non resident tourism expenditures, increasing from 39% in 1979 to 56% in 1989, most other regions are now capturing a smaller share: Cariboo Chilcotin accounts for 1% of year round non resident visitor expenditures, compared to 3% in 1979, presumably a result of a lack of opportunities to spend and increasing attractiveness of the Greater Vancouver Regional District resulting from its worldwide exposure during EXPO '86;

- In general, the primary purpose for 25% of visitors to the region (62% from overseas) were outdoors, wilderness and adventure travel. This compares to 8% for the province as a whole;

- R.V. and camping comprised the principal form of accommodation, with hotel and motels being selected by 17% of non resident visitors;

Table 4.5
Visitor Profile
Cariboo Chilcotin Tourism Region

1989

Figures in (000's)	Non Residents	Residents and Excursionists
Volume of Visitor Travel (%) *	55.00	45.00
Parties	123.60	101.10
Persons	309.00	267.92
Person nights	763.23 #	625.00 (Person trips)
Market Share (% of BC)		
Parties	4.00	4.00
Party nights	2.00	2.00
Revenue	1.00	1.00
Value in Millions of $		
Cariboo-Chilcotin	24.00	26.20
Province	2400.00	2620.00
Characteristics of Visitor Travel		
Province-Party size	2.47	
Length of stay	5.83	
Expenditures pppd ($)	54.90	
Cariboo-Party size	2.50	2.65
Length of stay	2.47	3.70
Expenditures pppd ($)	34.80	43.61
Excursion ($)	33.73	46.90

Note * Based on information from Visitor '89 and Resident Travel in British Columbia for 1989

Note # this differs from published information which is implicitly based on 2.91 nights which is the average length of stay for a published total of 900,000 person nights

- The region differs greatly from provincial averages in the area of geographic sources of non resident visitors: while 48% of visitors to the province come from other parts of Canada, residents of other provinces only account for 21% of visitor travel into the Cariboo. Washington and California account for 19% and 14% respectively with total visitors from the US representing 63% of non resident travel. In addition, 16% come from Overseas, 6% higher than BC provincial averages;

- Winter visitation accounts for only 5% of travel into the region, with 80% of year round travel being recorded in the spring and summer months. Such dramatic seasonal fluctuation can make it difficult to rationalize the economics of tourism infrastructure on a year round basis, particularly for potential new development;

- In general, participation in outdoors and sporting activities were recorded by 57% of non resident visitors to the region, compared to 39% for the province as a whole. 34% of residents who indicated that the Cariboo was their main destination stated that their main purpose was for an outdoor or wilderness trip. 20% can be attributed to "trail" related use. This is also higher than provincial averages which recorded outdoor trips as the main purpose for 8% of BC residents;

- After Kootenay Country, residents of the Cariboo show the highest propensity to travel of all the tourist regions of the province, year round, ranking #1 for summer travel, and second behind Kootenay Country in the third quarter;

- Travel within the Cariboo region is mainly by Cariboo residents, at 11% of overnight trips, followed by visits from residents of High Country (6%), and those of the North By North West region at 5%. The Cariboo represents a destination for only 3% of Southwestern B.C. residents;

- The Cariboo accounted for 4% of all overnight trips within the province by residents, recording 625,000 person trips, 44% of which occurred between December and March.

- The primary resident market for the Cariboo is the Southwestern region of the province, which recorded 56% of all overnight trips into the region. This was followed by trips by residents of the Thompson-Nicola, and North By North West regions at 9% each;

- Cariboo residents account for 41% of all resident excursion trips within the region (388,718 trips), followed by residents of High Country at 27% and those of the North By North West at 19%. These findings confirm the essentially "local" nature of excursion travel throughout the province;

- The "best" aspects of the Cariboo were scenery, at 58%, ranked second in the province behind Kootenay Country, recreation, campgrounds, wilderness and general touring, all first in the province at 25%, 15%, 11% and 11% respectively, of those surveyed. Accommodation, shopping opportunities and weather ranked lowest of all other regions of B.C.

4.3 Local Markets

At this time there are few specific details regarding the local markets available for the 100 Mile - 108 Mile House trail system. The immediate local population is approximately 1,800 inhabitants with another 2,500 within the adjacent regional setting. The community's TOTAL regional population, stretching from 70 Mile House to Lac La Hache is approximately 17,000.

The initial success of the the trail system could be determined by local markets and their support and enthusiasm for the trails. In part this enthusiasm has already been indicated simply through the strength of the local Cross Country Ski Organization and the strong participation recorded by its members. It is important that the total membership in the various trail organizations within the community grows (i.e. for snowmobiling, trail riding, etc.) as this will give the community added credibility in terms of promoting its trail infrastructure.

4.4 Potential Trail Markets

Having identified and defined the general tourism patterns in the Cariboo region and more specifically in the 100 Mile to 108 Mile area, it is now important to determine those markets most likely to be interested in travelling to this area to use the proposed trail system. Recognizing that the primary users will be the nordic skiers, we have also attempted to identify other winter trail users and non winter trail users in order to ensure the

widest possible market on which to earn a return on the investment. The following provides a brief overview of the profiles and characteristics for those target markets.

4.4.1 Nordic Skiing:

A study of the cross country ski industry in British Columbia conducted by this firm in 1988 included the following relevant conclusions within its findings:

- B.C. has about 330,000 cross country skiers, 7% of all Canada, Alberta and B.C. combined, account for 15% of Canadian cross country skiers;
- 26% of households own cross country equipment versus 17% for alpine;
- Women between 35 and 44 year of age comprise the largest group of high frequency skiers at approximately 11 skiing days per year;
- Cross country skiing is a strong family recreation sport, with 66% of participants married, and 60% accompanied by other family members;
- Vancouver has an estimated 225,000 cross country ski participants, almost 50% of B.C. participants reside in the Greater Vancouver and Lower Mainland areas;
- In general, the B.C. skier has a higher participation rate than the national average, at 12.85 skier days compared to 9.6 per year;
- Cross country ski areas distribution relates strongly to proximity to major populations, ie the Lower Mainland and Okanagan-Thompson regions;
- The Lower Mainland accounts for between 40% and 50% of all B.C. cross country skier visits annually;

- The Ministry of Economic Development has indicated that 88.3% of B.C. cross country skiers originate from within the province, while 4.9% come from other parts of Canada and 6.8% from outside Canada;

- Cross country skiers are more willing to travel further than 150 kilometres to enjoy their sport;

- The study concluded that zone 5, the Cariboo Chilcotin, was one of two zones with the highest opportunity of attracting an increasing share of the cross country ski market;

- There is high cross over-participation between cross country skiing and other sports especially cycling, swimming, camping and hiking;

- B.C's commercial cross country ski sector has the capacity for increased skier visits, particularly from those currently skiing at no charge on public land or non commercial sites.

- With both product enhancement and effective marketing, cross country ski growth of 20-25% over a period of 1-3 years is not unreasonable;

- There is an almost even split between male and female participants. Cross country skiers are generally better educated and earn above average salaries;

- A 1982 Canadian Travel Survey indicated that 723,000 overnight household trips involved cross country skiing as the primary activity. 80% of these were made on weekends with an average travelling distance of 221 kilometres from home. The average trip duration was 2.9 nights;

- While U.S. participation in cross country skiing is estimated to be between 4.9 million and 5.5 million, logical target markets for the B.C. cross country industry account for only 7.3%, or 372,227 skiers. These include Washington, Oregon, Idaho and Montana;

- Other characteristics of U.S. commercial ski areas indicate that 49% come from more than 160 km., 25% from 80 to 160 km., 10% from 40 to 80 km. and 16% up to 40 km.;

4.4.2 Snowmobiling:

The sport and industry of snowmobiling is presently experiencing a revitalization as a result of recent changes in equipment and demographics. A brief summary is presented below.

- The sport is rapidly becoming more sophisticated, as the sport becomes a focus for older affluent couples as opposed to macho male riders.

- Typical riders are 35 to 45 years of age, married homeowners, with above average annual household incomes in excess of $48,000.00;

- The majority of participants now reside in or near metropolitan areas as opposed to being primarily rural based as in the 1970's;

- While participation is still primarily towards males, the growth of the women in the sport has reduced men's dominance to about 2:1;

- Groups average 4.5 people and family participation is growing, with survey results indicating that many snowmobilers take an out of town trip. The median length of stay for such trips was surveyed at 8.72 nights;

- Trips averaged a mean travel distance of 286 km., with average expenditures on trips of $248.00 per person;

- An interesting secondary market may also be found at other times of the year, when 44% are estimated to return to the area in which they practice their sport for a summer trip;

4.4.3 Wildlife Viewing:

Due to generally severe climatic conditions in the area under study, the potential for wildlife viewing directly from or accessible from trails, as the primary purpose of the trip is somewhat limited. It is likely that such activities will form part of an overall package of activities marketed by individual operators throughout the region, the principal tool for which will either be cross country skiing or snowmobiling. Accordingly, we have discounted this opportunity as one that cannot be economically supported on its own merits, by winter market demand, however non winter demand and implications are addressed below;

4.4.4 Other Winter Trails Opportunities:

These are more of a specialized nature, but represent realistic market potential if the trail system is well conceived, planned, developed, professionally and knowledgeably operated and marketed in an integrated regional network. They would include special events, including media oriented sponsored competitions and courses of an educational nature, such as winter orienteering, winter survival in the rain forest, the B.C. winter games, leadership training, snow shoeing competitions, dogsledding and both bi- and triathlon events. The area is already host to a well known annual cross country ski marathon, and the media attention which such well organized events can generate must be considered as a positive, cost effective marketing tool from which the area can benefit on a year round basis;

4.4.5 Non Winter Markets

As indicated one of the primary issues respecting the investment to be made in the proposed trail system is the potential of **year round** trail use applications that can be capitalized upon. It has been concluded that the adventure travel market could be well served in this regard. The following summarizes this potential.

In, 1988, the Outdoor Recreation Council of BC conducted a survey of 396 non winter operators offering a variety of adventure travel packages. Of 17 activities reviewed, 4 are relevant to this study. These four include hiking,

backpacking, nature observation and trail riding. These accounted for 65.4% of day clients (290,100) and 43.3% of night clients (39,400).

Trail riding dominated the selected group at 97% of day client activity and 73% of overnight adventure travellers, followed in each case by hiking and backpacking, and nature observation in that order.

In general, the annual weighted average growth was recorded at 19% with the expectation that this could likely increase with more effective target marketing. Per person expenditures for adventure activities ranged widely from $75 to $390 per day. However the activities related to trail use were among the low end at $74 and $79 expenditure per day. The average package stay was for a 6 day period.

Visitors from the US were considered to be a prime market for nature observation, followed by residents at 45% and 24% respectively. BC residents dominated the marketplace at 64% and also lead in the hiking segment at 30%. Thereafter there was an almost even distribution between americans, albertans, and residents from other parts of Canada. Similarly, BC residents were found to be the greatest source of trail riders at 53% and overseas visitors ranked 2nd at 21%.

The study concluded that the age group market with the greatest potential for growth is in the 35-50 bracket, either alone or in couples as increasing numbers of older citizens seek less strenuous adventures. The Lower Mainland was estimated to be the dominant resident market source with urban centres in Alberta, California, Oregon, Ontario, and the northeastern US states offering the best growth potential in the future.

In addition to the above, the Cariboo Commercial Recreational Opportunities Study conducted in 1990 indicated that there appeared to be some potential for mountain biking in the area, with one 100 Mile House operator presently renting bikes for this purpose. There are no statistics available on the demand, user demographics, or future growth for this activity, yet indications from other trail activity areas (i.e. Methow Valley, WA) suggest tremendous potential for this growing sport.

4.5 Market Share Capture - Projected Trail Use Demand

Following our fieldwork, we identified the area's geographic marketplace and estimated its likely share of winter and non winter trails' activities, after completion of the trails' system under study. In developing our estimates, we assumed the provision of tourism infrastructure including such elements as accommodation, parking, food services, and various local retail outlets that adequately meets the needs of both the excursion and destination winter trails' visitor.

4.5.1 Cross Country Skiing

Reports on annual skier days indicate that these have fluctuated since the mid 1980's. This is partially a result of some inconsistencies in reporting together with the changing lengths of the nordic ski season which has primarily been a function of maintaining a reliable snow cover. Statistically the Okanagan/Thompson/Interior region (of which the 100 Mile House area is considered a part) accounted for an 18.6% share of the provincial nordic skiing activity at commercial centres during the 1985/86 season. With the completion of the proposed trails system, we believe that it is reasonable to ascribe an increasing share of the nordic market to this region, increasing to 23%, 25% and 26.5% between 1992 and 1994. Similarly we determined that the Cariboo's share of the Okanagan/Thompson/Interior market will account for not less than 75% of nordic skiing days in the area annually.

We have also speculated that the 100 Mile House share of the regional market should be about 50% of this total. Using a base figure provided by BC Tourism which suggests current demand in the 100 Mile - 108 Mile area is **approximately 12,000 skier days** (1990/91), we have calculated an incremental **increase of approximately 5,480; 7,640, and 9,250 skier days** respectively for the years 1992-1994; **if the trail system is upgraded**

Table 4.6 - Cross Country Ski Demand

REGIONAL COMMERCIAL X-COUNTRY SKI DEMAND AND PROJECTED 100 MILE HOUSE SHARE
ACTUAL 1984-1990; PROJECTED 1991-1994 (000's)

	'84/85	'85/86	'86/87	'87/88	'88/89	'89/90	'90/91	'91/92	'92/93	'93/94
								PROJECTED		
Participants (#)				325.30	336.69	348.47	360.67	373.29	391.95	411.55
Geographic origins:										
B.C.	85.00	87.40	88.30	72.20	81.00	63.00	65.00	67.50	70.00	69.50
Canada	6.80	8.00	4.90	18.50	9.00	24.00	22.50	19.00	16.00	15.50
International	8.00	4.60	6.80	12.60	11.00	14.00	12.50	13.50	14.00	15.00
Regional market share % :										
GVRD		35.00	35.00	35.00	35.00	35.00	35.00	32.50	30.00	29.00
Thompson/Okanagan/Interior		18.60	18.60	18.60	18.60	18.60	18.60	23.10	25.00	26.50
Other B.C.		9.70	9.70	9.70	9.70	9.70	9.70	8.50	9.25	8.75
Vancouver Island		9.10	9.10	9.10	9.10	9.10	9.10	8.25	8.00	8.00
Area market share:										
Alpine areas %	70.00	93.03	88.62	77.00	98.49	91.28	82.18	67.75	57.54	65.91	70.21
Cypress					38.30	37.57	38.89	40.25	41.66	43.11	44.62
100-108 Mile Area current								12.00	12.42	12.85	13.37
Cariboo Region projected									23.39	28.13	31.80
									5.48	7.64	9.25
100 MILE HOUSE PROJECTED Incremental SHAR (000's)						12.85					
Skier days/participant											
Total skier days (commercial)	132.90	126.60	110.00	140.70	130.40	117.40	120.00	135.00	150.00	160.00
B.C.	112.97	110.65	97.13	101.59	105.62	73.96	78.00	91.13	105.00	111.20
Canada	9.04	10.13	5.39	26.03	11.74	28.18	27.00	25.65	24.00	24.80
International	10.63	5.82	7.48	17.73	14.34	16.44	15.00	18.23	21.00	24.00

and better marketed. **Table 4.6** summarizes these projections and demonstrates the impact this increase will have on the TOTAL South Cariboo cross country skier projections suggesting that by **1993/94** the overall region could be attracting **31,800 skiers**. Of this total, we estimate that the 100 Mile House area could see an additional 9,250 skiers for a total skier visit projection of approximately **22,600.**

4.5.2 Destination Snowmobiling

Total snowmobile registrations in BC are estimated to be 52,689 machines for 1989 (ISIA). Using assumptions applied in comparable studies (i.e. NOSA,1991; Wisconsin, 1990) which include estimating that portion of the total snowmobiling market which is willing to travel more than 150 miles (one way) and out of the participant's home region, we previously calculated that the province could attract approximately **6,196 destination snowmobilers** from markets in British Columbia, Alberta, Idaho, Washington and Oregon (**Table 4.7**).

Premised on our fieldwork and based on the assumption that snowmobiling trails will also be upgraded or improved in the study area (in part to ameliorate current motorized/non-motorized conflict situations) we have assigned a 20% market share to the new regional trail network. We feel this ratio may be conservative. Similar to our approach for the cross country skiing market, we estimate that the market share within the region will be about 50% providing the 100 Mile House area with approximately 640 destination snowmobilers in 1990/91.

Table 4.8 summarizes our calculations and projections.

Table 4.7
ESTIMATED POTENTIAL DESTINATION SNOWMOBILING MARKET

Location	Number of Registered Machines[1]	Number of Unregistered Machines[2]	Number of Households[3]	Number of Active Riders[4]	Overnight Tourers[5]	Distance Factor[6]	Potential Market[7]
Washington	17280	34560	19200	61440	10445	3656	914
Oregon	9533	19066	10592	33895	5762	2016	504
California	7989	15978	8876	28405	4828	1690	422
Idaho	15356	30712	17062	54599	9282	3249	812
Alberta	14169	28338	15743	50378	8564	2998	749
British Columbia	52689	105378	58543	187339	31848	11147	2787
Total	**117016**	**234032**	**130018**	**416057**	**70730**	**24755**	**6189**

Notes:

- 1 Source: ISIS North American Snowmobile _ Registration Survey, 1986 to 1989-90
- 2 ISIA figures as provided by individual states and provinces indicate that estimates of unregistered snowmobiles can range from as low as 1/4 of the number of registered machines as in teh case of California up to as many as 2.5 times the number reported in Montana. ISIA estimates that overall, registrations account for only about 1/2 the actual number of snowmobiles within the snow belt in any given year.
- 3 In a study completed by the University of Waterloo Occassional Paper #7 (1989), it was indicated that OFSC survey respondents owned an average of 1.8 snowmobiles per household
- 4 The University of Waterloo's occassinal paper #7 also estimated that an average of 3.2 persons per snowmobile owning household rode during the the 1989 season.
- 5 Sources: 52% for Ontario from the University of Waterloo's occassional paper #7, 27.5% for Michigan and Wisconsin from the Algoma Study (1990), Minnesota presumed to be 27.5% based on telephone conversation with Minnesota Tourism; and 17% for Manitoba based on University of Manitoba report. We have used 17%
- 6 Based on Snowmobile Magazine reference in the Algoma study, it can be deduced that only 35% of those snowmobilers who take overnight trips are willing to travel more than 150 miles from their point of origin to reach a snowmobiling destination. A May 1991 survey report from the University of Wisconsin suggests that as a group, overnight snowmobiling vacationers in that state averaged 290 miles one way to reach their destinations, and that 59% had actually driven further than 201 miles. We have used the more conservative 35%.
- 7 According to the Algoma Study, while 46% of those snowmobilers surveyed expressed an interest in travelling on overnight snowmobile trips, only 17.7% actually did. To bridge this gap between intent and actualization, the Algoma Study chose a midpoint figure of 25% to represent the potential market. We have used 25% here.

TABLE 4.8
Snowmobile Projected Demand / Market Share

(000's) of Users

	BRITISH COLUMBIA #	%	20.0 SHARE %	27.5 SHARE %	35.0 SHARE %
TOTAL REGIONAL POTENTIAL	6186.0	100.0			
Annual growth:					
1990/91	6402.5	3.5	1280.5	1760.7	2240.9
1991/92	6658.6	4.0	1331.7	1831.1	2330.5
1992/93	6991.5	5.0	1398.3	1922.7	2447.0
1993/94	7341.1	5.0	1468.2	2018.8	2569.4

4.5.3 Non Winter Trail Markets

The non winter demand is confined to the April to September period which handles 56% of regional visitor volume. The area accounts for 4% of provincial overnight visitor parties with an average party size of 2.54 for non residents.

Outdoor wilderness activities, excluding participation in skiing and hunting, attracted almost 26 percent of overnighting resident visitors and 19 percent of non-resident visitors in 1989/90, as indicated on **Table 4.9.** Based on participation rates in trail related activities most likely to be associated with those seeking an outdoor/wilderness experience, it is clear that trail riding dominates the non-winter trail activities with almost 32 percent participation and attracts almost 43,000 participants of those who are overnight visitors in the region. Rates for participation in other trail based activities like hiking or nature study drop off dramatically.

TABLE 4.9
Projected Non Winter Trail Use Demand - 1989

APRIL TO SEPTEMBER - 1989

100 MILE HOUSE MARKET SHARE PROJECTIONS - 1989 - 1994

			OVERNIGHT VISITOR		EXCURSION		
CARIBOO REGION			**RESIDENT**	**NON RES**	**NON RES**	**RESIDENT**	
Total visitor parties-							
- annual	(000's)			123.60	31.01		
Total person trips-							
- annual			624.40	309.00	77.21	653.80	
- 2nd. quarter			174.83	95.79	19.84	130.76	
- 3rd. quarter			174.83	148.32	15.60	91.53	
Outdoors/Wilderness(%)			25.80	19.00	4.00	12.00	
							EXCURSION
Preferred activities-	%						%
- Hiking		4.35	3.92	2.02	0.01	0.17	0.63
- Backpacking		4.35	3.92	2.02	0.01	0.17	0.63
- Nature		3.00	2.71	1.39	0.01	0.13	0.49
- Trail riding		31.60	28.51	14.66	0.00	16.98	63.65
- Total 1989			**39.06**	**20.08**	**0.02**	**17.45**	
100 MILE HOUSE SHARE - (000'S)							
- 33% OF REGIONAL		1989	12.89	6.63	0.01	5.76	
		1990	15.60	8.00	0.30	6.90	
		1991	**16.40**	**8.40**	**0.37**	**7.30**	
		1992	16.80	8.60	0.40	7.50	
		1993	18.80	9.70	0.43	7.70	
		1994	21.30	10.90	0.48	7.90	

We have assumed that provincial visitor growth will remain at the 2% level over the forecast period with preferred activities growing at an annual rate of 19% consistent with the findings of the 1988 Adventure Travel Study. Similarly, we have estimated that the 100 Mile House area should increase its penetration of the

non winter visitor market after completion of the trail system. Accordingly, we have calculated a 33% share of regional trail activity, annually, from 1992 to 1994. **Table 4.9** presents our projections for **non winter trail use** in the 100 Mile House area indicating an estimated **total of 23,700 RESIDENT** trail users and **8,770 NON RESIDENT** trail users **in 1991.**

SUMMARY - TOTAL TRAIL DEMAND

As illustrated on **Table 4.10,** we have estimated that total year round trail demand in the 100 Mile House area could be approximately 45,000 visits in 1990/91. The majority of visits will remain initially with NON WINTER users who are broken into two groups, destination/overnight and day-use/excursion.

By 1993/94 we have projected potential year round trail use visitors to grow to almost 64,000 participants representing approximately 10% growth, overall per year. Cross Country skier visits are projected to almost double in size to **22, 620** visits by 1993/94.

TABLE 4.10
SUMMARY - YEAR ROUND TRAIL DEMAND

SEASON/ACTIVITY	90/91	91/92	92/93	93/94
Winter Use				
Cross Country	12,000	17,900	20,490	22,620
Snowmobiling	640	665	699	734
Non Winter Use				
Destination/Overnight	24,800	25,400	28,500	32,200
Day Use/Excursion	7,670	7,900	8,130	8,380
TOTAL TRAIL USE	**45,110**	**51,865**	**57,819**	**63,934**

4.6 ROOM DEMAND:

Annual transient room demand is considered to be a major barometer of the health of the tourism industry. It is typically strongest in the traditional late spring, summer and early fall months. For a broad range of British Columbia operators, this is a reflection of the desirability of the province as a summer destination area. Historically, the months of November through March represent the period of lowest demand, with visitor strength improving through the early spring and dropping off dramatically after the Labour day weekend in September.

Communities with broad based economies tend to suffer less from these severe seasonal fluctuations, with the year round business traveller marketplace contributing a desirable measure of much needed stability for economic health. By contrast, operators in communities heavily dependent on tourism, are vulnerable to a variety of factors, largely outside their abilities to control, such as increases in energy prices, political instability, fluctuating currency rates and the weather. While such areas continue to attract commercial development and the meetings market segment, their principal locational strength, from a tourism standpoint, namely relative inaccessibility is, in most instances, the major constraint to lessening seasonal fluctuations, through the achievement of fair share of these market segments. Accordingly, the economic performance of tourism plant operators in general is not encouraging, with peak season profits largely eroded through the cost of remaining open during the balance of the year.

Annual room occupancy for a range of motels and hotel operations in the Cariboo Chilcotin region was recorded at 48.3% and 55.7% respectively for the year ending December 1990, with leading properties at the high 60% to low 70% level, year round. This compares to 68%, province wide for hotels for the same period, and 58.3% for motel operations. Accordingly, an improvement of approximately 5 percentage points for each segment over the previous year was recorded.

Hotel average room rates were reported at $43.17, for the sample, with area leaders experiencing average room rates in the low to mid $80.00 range. Hotel and motel operators in 100 and 108 Mile House area reported Village wide occupancies averaging 62% for 1990, ranging from a low of 50% to a high of almost 80% for one of the area leaders. . Average room rates for Motel also ranged widely, between $33.00 to a high of almost $90.00, with the Village average reported at $52.78. In general, average room rates reflect levels similar to recent years, with only two properties showing significant average room rate improvements.

Demand is strongest during the summer months, with area demand resulting in occupancies in the high 80% range. Aggressive marketing of a variety of packages help lessen seasonal fluctuations for the area's higher quality properties and year round facilities. The difficulty experienced by operators recording optimum room demand during the summer months is that, in general, they are at capacity for a ninety to one hundred day period, and record varying levels of "turnaways".

In general, third quarter room demand and annual summer demand growth could economically support additions to room inventory. In the absence of additional rooms, improved profitability for existing operators can only be achieved either by changing the sales mix to a higher percentage of more affluent overnight travellers, or increasing room rates to the point of market resistance, either proposition a risky one, with potential for losing a share of markets currently enjoyed.

By contrast, demand drops off so severely after Labour Day for all but a few particularly well targeted operators, that economic support for additional rooms can not presently be rationalised on a year round basis. In addition, as a majority of operations are small, with less than fifty rooms, it is unlikely that even strong cash flow performance during peak summer months would be adequate to use as equity towards the development of additional rooms. We anticipate that with the completion of the area's winter trails' network, seasonal fluctuations will be mitigated somewhat, encouraging existing operators to expand their facilities and encourage other, new facilities to be developed.

Should the Ainsworth Lumber plant development proceed in the 100 Mile House area, there is some opportunity for local operators to capture short term occupancies.

4.6.1 CHARACTERISTICS OF DEMAND:

The corporate business traveller, both north and southbound, accounts for no less than 35% year round demand for a majority of 100 Mile House operators in both full service hotel and minimum service motel operations. The Village location, on a prominent north-south major transportation artery, connecting the Lower Mainland of the province with Williams Lake and points north, eventually to Alaska, is a major locational strength of the community for both business and road borne pleasure travellers. Automobile travel remains the principal mode of transportation for most resident and non resident visitors to the area at over 80 percent travelling by car or camper.

The United States represents the source of the greatest number of non resident visitors who account for slightly less than half of the area's overall visitor mix: resident British Columbians, particularly from the Lower Mainland of the province, and non resident Canadians comprise the majority, more or less consistent with provincial norms. Overseas visitors account for the balance, at 10% to 12%, several percentage points lower than regional averages. Notwithstanding, the international marketplace is of significance for selected individual operators during the summer months and for Cross Country skiing and Fall hunting seasons.

Demand for the first half of 1991 has been adversely affected by two matters outside the ability of the community to control: the initiation of the Goods and Services Tax and the Gulf War have combined to depress visits from U.S. residents in particular, and the War reducing levels of both U.S. and overseas visitors to date. It is likely that the economic performance of guide outfitters in the area was adversely affected this year by the War.

The meetings market contributes between 20% and 25% of year round room demand for those operations equipped to handle small conferences in the shoulder months of February - June and September - mid November. Packaging a variety of sporting activities is an important marketing tool for a majority of the full service hotels and resorts . As the area is well known for its cross country skiing and guest ranch related activities; horse, trail and Nordic skiing are major demand catalysts.

5.0 PRODUCT EVALUATION

The preceding chapters examined the general economic conditions affecting the 100 Mile House area and the current changes within the nordic ski industry, as well as reviewing the available "trail use" market to the area. It is now possible to evaluate the existing " tourism product" available in the 100 Mile - 108 Mile House area with a better understanding as to its ability to expand its cross country ski appeal and identity as a true skier destination.

We have split our product assessment into two components;

- Trails - as they relate to the benefit of the overall area
- Infrastructure - which should complement the trail system requirements, but is mostly the responsibility of the private sector.

We have used a technical approach to objectively evaluate each component. The following details our extensive assessment of each component and provides a summary identifying the opportunities and constraints.

5.1 Trail Network Evaluation - Approach

In order to provide an objective assessment regarding the existing and potential trail conditions in the 100 Mile - 108 Mile House area a trail evaluation system was employed. This system was previously developed by *NordicGroup* and has been successfully applied to similar site assessments in Gatineau Park, Sault Ste. Marie and Kimberley, B.C. and more recently in Wells Gray Provincial Park.

The evaluation uses a field inventory checklist as illustrated in **Table 5.1** to record a numerical value assessing the status or condition of a number of factors.

Table 5.2 summarizes the range of trail evaluation criteria and the scoring (rating) system used to assess the field conditions. The criteria selected for this process are organized according to one of three categories:

- **Trail Use** - those factors which could most readily determine basic trail activities

4.7 THE COMPETITIVE ENVIRONMENT:

Based on our fieldwork, and experience of principal seasonal market segments in the province, we concluded that room demand from the year round available commercial marketplace is not likely to diminish over the period of our review. On the contrary, the development of the proposed pulp processing plant in 100 Mile House over the next two years should result in a significant enhancement of demand from the commercial market segment. In addition, it is reasonable to assume that the prominence of Highway #97, will continue to provide the preferred transportation route both in a north and south bound direction for both commercial and visitor traffic.

The long haul visitor marketplace, including guide outfitter clients, will continue to be influenced by factors outside the community's ability to control. Of these segments, the U.S. originating visitor will continue to be of significantly greater importance than the traveller from overseas. It is our view that the Village should be able to increase its penetration of the U.S., particularly Washington and Oregon states, Alberta and Lower Mainland of the province by more effective target marketing, for both summer and shoulder season individual, group and senior visitors. In our view the only intervening summer opportunity which represents some competitiveness is Barkerville, and that because 100 Mile has not clearly identified itself as a desirable overnight visitor destination area. The development of an enhanced trails network, professionally designed, constructed, and effectively marketed should allow the Village to increase its share of the travel market.

The Lower Mainland potentially represents increasing direct competition to the Village from the standpoint of easy access to a variety of quality commercial cross country ski trails. Currently, this is supplied at one major facility near Vancouver, with two smaller areas en route to 100 Mile House. As the Lower Mainland is expected to remain the principal market for a winter trails' experience, the Village must ensure they can provide both the range and quality of visitor experiences to firmly establish itself and its trails as a destination for Lower Mainland visitors. We are not aware of any plans for enhanced trail development in the Lower Mainland or at locations en route to 100 Mile House from this area, which might otherwise represent increased competition.

TABLE 5.1
Trail Inventory Checklist

Trail Section: _____

CAT	FACTOR	RATING	SECTION					
Trail	Tread Width	0:1:2:3:4						
	Slope	0:1:2:3:4						
	Surface	0:1:2:3:4:5:6						
	Route Def'n	0:1:2:3						
Trail Dev. Factors								
	Surface	0:1:2:3:4						
	Vegetation	0:1:2:3:4						
	Drainage	0:1:2:3:4:						
	Soils	0:1:2:3:						
	Cross Slope	0:1:2:3						
	Habitat							
	Environment							
	Flora							
	Special Needs							

Comments: _____

TABLE 5.2

Trail Evaluation Rating System

CATEGORY	FACTOR	DESCRIPTION	RATING		SPECIAL FEATURES	HABITAT	
TRAIL USE POTENTIAL	TREAD WIDTH	no visible tread	0	VEGETATION CLEARING WIDTH	very dense, severely overgrown, no visible clearing - 0		note on habitat conditions that could affect trail use (e.g. moose habitat, sensitive habitats)
		< 1 meter	1			ENVIRONMENT	
		1 - 2 meters	2		dense vegetation at all levels but some clearing in place - 1		note on general environmental conditions, ecological setting, impact trail use or construction could have
		2 - 3 meters	3				
		> 3 meters	4		moderately dense vegetation clearing width, 1 to 2 meters - 2	FLORA	identification of special flora / fauna of interest to trail users
	SLOPE	> 30%	0				
		20 - 30%	1		moderately dense upper vegetation stories, but clearing width of 2 - 4 meters in place - 3	SPECIAL NEEDS	note on capacity to accommodate special users (e.g. disabled) or special uses (e.g. interpretation, outdoor education)
		10 - 20%	2				
		5 - 10%	3		moderately open to open, no vegetation clearing restrictions clearing width > 4 meters - 4		
		0 - 5%	4				
	SURFACE	moss, lichen cover	0	DRAINAGE	open water, standing water - 0		
		natural soil	1				
		wood chips, fibres	2		mostly boggy, wet or poorly drained sections > 100 m - 1		
		non-vegetated bedrock	3				
		loose gravel, cinder	4		occasional wet areas or poorly drained sections < 50 m - 2		
		compacted gravel	5				
		asphalt, cement, boardwalk	6		well-drained, dry surface throughout - 3		
	ROUTE DEFINITION	abandoned roads, trails	0	SOILS			
		footpaths, evidence of some clearing	1		very high impact to wear/ erosion; well drained soils on slopes > 30% / poorly drained on slopes 5 - 30% - 0		
		developed trails	2				
		old roads in usable condition	3		high impact; well drained sandy/loamy soils on slopes 15 - 60%, poor on slopes < 5% - 1		
TRAIL DEVELOPMENT FACTORS (Limitations)	SURFACE CONDITIONS	impassable; deadfall, debris extreme roughness or wetness	0				
		Frequent dips, bumps, rough surface conditions with exposed roots, rocks	1		some impact potential (trampling) well drained soils on slopes < 15% - 2		
		level with some uneven surface some rough, but walkable	2				
		undulating surface with some dips & bumps but not rough	3		no evidence of soil impact, stable soil conditions - 3		
		level surface throughout with no surface impediments or roughness	4	CROSS SLOPES	severe side slope conditions > 40% - 0		
					fair side slopes, some restrictions, 20 - 40% - 1		
					good side slope conditions short sections 5 - 20% - 2		
					excellent slope conditions no restrictions, slopes 0 - 5% - 3		

- **Trail Development** - those factors which further limit or define the type of trail use potential, especially if it would involve actual trail development or construction
- **Special Features** - those factors which could add or detract from the overall user appeal of a particular trail or trail routing

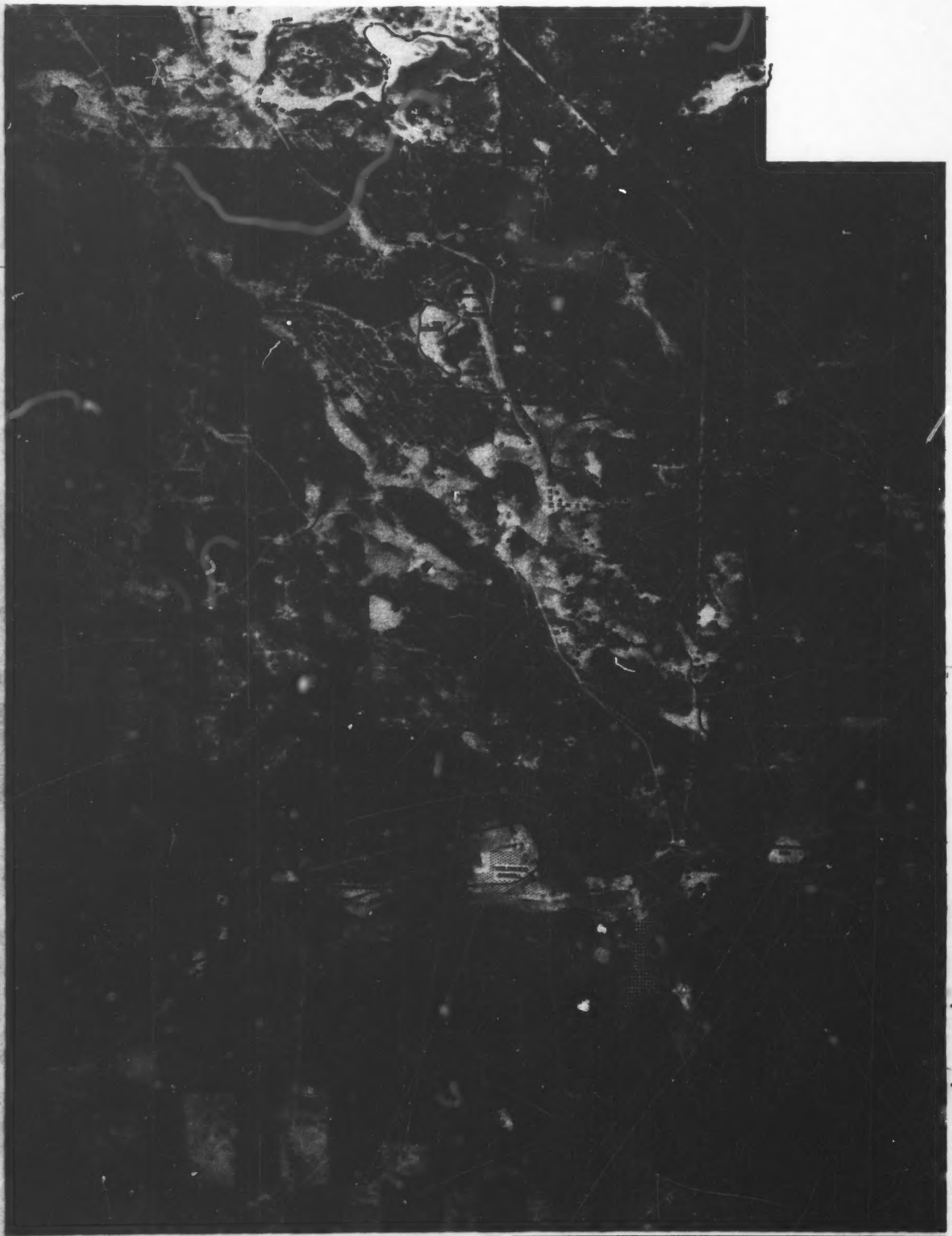
The Trail Inventory was completed by local trail users having extensive knowledge and familiarity with the trails. In addition, most of the trail areas were field checked by the Consultant. A sample of a completed field investigation summary is provided in Appendix 1.

The following gives a brief description of the character and findings for each of the trails identified in the study area. **Map 2** the approximate location and existing conditions affecting the trails within the overall regional setting. **Map 3** provides an overview at an enlarged scale, of the trails and conditions found in the core area of 100 Mile House.

It should be pointed out that the total study area although marketed as the "Cariboo Trails", is comprised of three distinct trail areas and a number of trail connectors including:

- Red Coach Inn Trail System
- 99 Mile House Nordic Centre
- 108 Resort / The Hills
- Marathon Route Connectors

Our discussion of the existing trails is organized accordingly. Throughout this section we have included a number of photographs to highlight the range of conditions found along the existing trail network and illustrate the opportunities and constraints affecting future development and expansion potential.



Legend

- VILLAGE AREA
- INDUSTRIAL LANDS
- PRIVATE LANDS
- EXISTING CABINS
- SECONDARY ROADS
- EXISTING TRAILS
- ABANDONED TRAILS
- BRIDGES

Notes

Project 99 - 108 MILE SKI AREA MASTER PLAN

Bar scale 0 500 1000 1500 Metres

Map Title EXISTING CONDITIONS

Project by Nordic Group of Companies — Alberta, Montana, New Hampshire, Ontario

Client B.C. MINISTRY OF TOURISM, 100-108 MILE HOUSE, B.C.

Designed	B.D.
Drawn	L.P.
Checked	B.D.
Scale	1:20,000
Date	August 1991

File No.

Project No.

Sheet No. 2

Legend

Notes

Project **99 - 108 MILE SKI AREA MASTER PLAN**

Bar Scale 0 50 100 150 200 Metres

Map Title COMMUNITY - EXISTING CONDITIONS

Project By

Designed

Drawn

Checked

File No.

Project No.

Client B.C. MINISTRY OF TOURISM
100-108 MILE HOUSE, B.C.

Scale 1:2500

Date

Sheet No. 3

5.2 Trail Evaluations - Field Summaries

- **RED COACH SYSTEM:**

TRAIL: WILLOWDALE **LENGTH: 9 KM**

This trail start at the old Cariboo Trail Barn across from the Red Coach Inn (Figure 5.1) and represents one of the major trails in the Red Coach System. This trail travels east paralleling in part Bridge Creek (Figure 5.2). A number of shelters are found along the trail at km 4.6 and 9.0. The trail passes through a variety of landscapes and open areas as well as an old settler's cabin and canal area. This trail has all the elements to truly capture a "true West" spirit including; trail side livestock (horses, cattle), old canals, cabins, and follows a trapline.

Trail Spec:
Mostly an old road or developed trail; mostly natural soils over flat terrain. Tread width (for grooming) - mostly >3m remainder 2-3 metre. Surface condition: Undulating but not rough, no vegetation cleaning constraint,mostly well drained, but soils have some potential for impact. Primarily an easy ski trail with latter segments intermediate and advanced.

TRAIL: "C" **LENGTH: 6.2 KM**

This trail branches off the Willowdale Trail and crosses the old Dog Musher Bridge. The trail passes through a mixed landscape similar to Willowdale. Segments go through moderately dense forest requiring some clearing to improve snow capture. The trail forms a loop through an old hay field connecting up with the upper Willowdale Cabin.

Trail Spec:
This is a developed trail having a total width between 2-3 metres wide comprised of natural soils. Surface conditions are uniform, with some undulation but not rough. Approx. 1 km of trail poses some steep conditions near the end which could be improved. Some conflicts with snowmobiles occur along this trail.

TRAIL: 99 Mile Connector **LENGTH:** 10.4 km

This trail begins at the end of the road behind the Red Coach Inn and continues west past Exeter Lake across adjacent exposure meadow areas. The trail ends where it connects into the 10 km loop at the 99 Mile trails and presents an interesting view of a "Dry Belt" Interior Forest.

The start of the trail conflicts with farm area, but leaves the community behind for an interesting route offering plenty of views, variety, scenic meadows (Figure 5.3), tall forests. Near the railroad tunnel crossing on historic native "Kwikwilly" can be found at the edge of an enclosed meadow. This area has tremendous potential for additional trail development. Apart from the short distance near the village, this trail has good snow coverage.

Figure 5.1 - Willowdale Trail

Figure 5.2 Bridge Creek

Trail Spec:

Majority of trail is old road in useable condition, with approx. 2 km being nearby developed trail. Overall trail is fairly uniform in surface condition. Some wet areas found in meadows and in seeps along the forest trail.

Several creek crossings. Some steep areas around km 7.0.

Figure 5.3 Scenic meadow along 99 Mile Trail

TRAIL: Exeter Lake Loop **LENGTH:** 2.4 km

Basically a loop around Exeter Lake. While generally easy and open suffers from poor snow retention, wet areas, wind exposure. Generally used as a starting area for the Cariboo Marathon.

Trail Spec:

A development trail through moderately open landscape having a tread width of >3 metres.

TRAIL: 19 **LENGTH:** 1.0 km

Represents a short scenic loop off Willowdale Trail, passing by clumps of Pine Forest and along a natural Cariboo Meadow.

Trail Spec:

Excellent treed, surface conditions having minimal impact on soils, erosion.

TRAIL: 20 **LENGTH: 1.0 km**

Another short, scenic loop off Willowdale Trail. Generally in good condition with no problems but occasional wet areas.

TRAIL: 21 **LENGTH: 1.6 km**

Represents an abandoned Dog Musher Trail, that was built a few years earlier. Overall, this is a good trail but has some drainage problems in the spring. Half of the trail parallels Forest Grove Road and continues through a selective logging area.

TRAIL: 22 & 23 **LENGTH: 1 km**

This is primarily a connector trail through a Pine Forest meeting at Bridge Creek. Trail is mostly sited in an open meadow environment. The trail conditions are generally good.

TRAIL: 15 **LENGTH: 2.6 km**

This is a connecting trail to the Marathon Route west of Davy Lake. The trail has nine lookout potential overlooking Stephenson Lake ... however, it is on a south facing slope so suffers from snow retention problems.

• 108 MILE / THE HILLS SYSTEM

TRAIL: "M 3" (Marathon) **LENGTH: 7.6 km**

This represents one of the Marathon Trail Options running parallel along parts of Hwy 97 and partially following the old Cariboo Wagon Road.

This trail is in fairly good condition as it follows the old Wagon Road, however, with south facing slopes, wind and exposure along the Highway and some conflicts with private land use, the trail is not heavily used.

TRAIL: "M 2" (Marathon) **LENGTH: 14.4 km**

This trail has been improved near its beginning at the Bridge Creek Barns, directly across the street from the Red Coach Inn.

This trail has been the "gateway" trail and major trail start area for the Cariboo Marathon and as the primary connecting trail to the 108 Resort and the Hills Health and Guest Ranch.

Because of its length, it traverses a wide variety of landscapes and terrain as well as conflict areas with other users including; snowmobiling, private lands, logging, etc. In some sections the trail encounters open spaces affecting snow retention while other sections are steep and challenging. Overall the trail gives a comprehensive overview of the Cariboo character. Also, as a bonus, it joins into the original Wagon Road offering scenic panoramas of the area (See Figure 5.4)

Trail Spec:

Generally in pretty good condition throughout with some sections being superb. Some areas require regrading, drainage improvements.

Large sections of this trail follows old logging roads (Figure 5.5).

TRAIL: Golf Course **LENGTH:** 3.4 km

Starting at the 108 Ski Shop and Restaurant area in front of the 108 Resort, this trail winds its way along the picturesque golf course. In areas, the trail needs protection from wind and sun, and in other sections could be widened for skating.

Overall very scenic and popular trail. Also night lit but needs repairs.

TRAIL: 1 "A" into 1 **LENGTH:** 5.4 km

This trail start on the east side of the road across from the 108 Resort and represents one of the most skied trails in the 108 community. The trail follows a recently cut trail behind the 108 airport landing strip and crosses the historic Cariboo Wagon Road.

It connects into the primary trail staging area located at the 108 Heritage Site and crosses Hwy 97 via a pedestrian tunnel /culvert (Figure 5.6).

This trail can offer some good wind and snow protection ideal for teaching and connects into a number of other trails around the 108 Resort. Some steep sections leading down to the tunnel crossing need widening.

TRAIL: 1 "b" **LENGTH:** 1.2 km

Primarily follows the old Gold Rush Trail which parallels the 108 Airstrip (Figure 5.7) The Highway crossing to "the Hills" is potentially dangerous (Figure 5.8).

TRAIL: 1 "c" **LENGTH:** 1.3 km

This is a short, all season trail along the shore of 108 Mile Lake. This trail could use some widening for better grooming and could benefit with some interpretive signage. This is a typical trail following one of the many original trail "easements" found throughout the area. (Figure 5.9). Some conflicts occur with resident snowmobilers using the same trails.

Figure 5.4 - Scenic View along the Marathon Trail

Figure 5.5 - Section of Trail along Current Logging Road

Figure 5.6 Trail 1"A" /Tunnel Crossing

Figure 5.7 Historic Cariboo Wagon Road

TRAIL: 2 **LENGTH:** 2.0 km

Connecting trail paralleling an existing old road along Sucker Creek joining into Tubbs Lake Road and trails # 1 and #7.

Some boggy areas along Creek... but has interpretive potential as a spawning area for 108 Lake.

TRAIL: 3 **LENGTH:** 3.6 km

This is an old race trail built to "technical" standards. Generally in good condition, but goes through a logging site which needs clean up.

Overall, trail could be widened somewhat to allow skating.

TRAIL: 4 **LENGTH:** 2.4 km

Also designed as a race trail; encounters steep slopes and sharp corners and has several intersections which are potentially dangerous.

TRAIL: 5 **LENGTH:** 6.4 km

This is a climbing trail with some pleasant views over surrounding lake areas to the north/east of 108 Mile Lake. First kilometre is on a south facing slope resulting in snow retention problems.

As well, this trail suffers from occasional snowmobile conflict from snowmobilers using the tunnel crossing as a connecting route to 115 Mile House. This trail is also used by 4x4's in summer , creating ruts in the trail.

TRAIL: 6 **LENGTH:** 4.2 km

Another loop trail on the hills east of the Heritage Site on what is known as the Monocle Ranch. The setting is picturesque meadows and poplar groves which make ideal winter habitat for deer. A viewpoint from the top provides a scenic overlook.

Figure 5.8 - Dangerous Road Crossing between the 108 and the Hills

Figure 5.9 - Trail 1"c" along 108 Mile Lake

TRAIL: 7 **LENGTH:** 4.1 km

This is an interesting loop trail off Tubbs Lake Road; has excellent exposure making this trail one of the last to melt in the spring. There is a small warming hut and viewpoint at .5km. Unfortunately, recent logging has marred the trail surface.

TRAIL: 8 **LENGTH:** 4.4 km

This trail loops around Soda Lake to the north and is of interest for the old Settler's Cabin at 2.7 km. This trail is not heavily used and parts are overgrown, representing an old abandoned road. With some improvements this trail could be quite pleasant and interesting as well as suitable for other trail uses.

TRAIL: 9 **LENGTH:** 1.2 km

This is a short, rolling connecting trail with one particular short, steep section which could prove challenging.

TRAIL: 10 **LENGTH:** 4.4 km

This trail is the old Cariboo Wagon Road. Its rich history has been discarded by giving it a numbered designation (Figure 5.10).

This trail is very popular for skating as it is quite wide, and with its easy access and close proximity to both resorts it is an ideal beginner trail. Occasionally, there are conflicts with horses or cattle which can ruin trail grooming in winter.

Another problem is that this trail is also used as an instruction area because it is flat. Skiers skiing through can cause disruption.

Trail Specification:
Overall, this is one of the best quality trail sections in the total trail system. It has a smooth surface, well graded, good drainage, open with views through the trees ... and it has history.

TRAIL: 11 **LENGTH:** .2 km

Connecting trail frequently ruined by wandering cattle.

TRAIL: 12 **LENGTH:** 4.2 km

A connecting trail to #10 characterized by a gently changing grade with several interesting viewpoints over the Cariboo. Parts of this trail are slightly overgrown, with some drainage problems that should be remedied.

Figure 5.10 - Cariboo Wagon Road - Trail #10

TRAIL: 13 **LENGTH:** .8 km

Connecting trail.

TRAIL: 14 **LENGTH:** 4.8 km

Connecting trail following an old abandoned road for 1.5 km; needing some upgrading.

• THE HILLS SYSTEM

Although several key connecting trails that tie into the overall REGIONAL trail network can be found on the Hills property, this 300 acre guest ranch has developed its own trail system measuring about 27 km and including 16 different trail loops.

Most of the trails have been built by the owner by grading out a trail surface. All the trails are between 4 - 5 metres wide and most have only been rough graded leaving the surface uneven and coarse (FIGURE 5.11)

Figure 5.11 -Fenceline Trail at the Hills

The trails maximize the full use of all available land, with some trails paralleling each other only 75 feet apart. Yet, the rolling nature of the property, the mix of open fields and wooded areas and occasional ridges and hills makes for an entertaining system (FIGURE 5.12)

Figure 5.12 - Sample Trail at the Hills

However, the overall number of intersections and changing trail numbers does make for confusion. And although some attempts have been made at theming (i.e., Billy Miner's Cabin, Judge Begbie's Cabin) the trails do not take full advantage of interpretive and other program opportunities, nor has there been much attention to aesthetics that could increase overall trail appeal.

• 99 MILE TRAILS SYSTEM

These trails were specifically planned and designed to FIS Standards to meet competitive racing qualifications, by B.C. Forestry and the volunteers of the 99 Mile Nordic Club and represent some of the finest trails in the region (Figure 5.13)

The trails are on a north facing, heavily timbered slope approx. 500 metres higher evaluation than 100 Mile House.

The network is organized in an expanding stacked loop layout having; 1, 2.5, 3.5, 5, 7.5 and 10 km loops. All the trails have been cut to 6 metres width, have graded and grassed surfaces, banked corners and some drainage controls. As well, the area has a 2.5 km lit trail (Figure 5.14).

There is a large parking area and new, log structure day lodge. The area is well signed and offers a challenging ski for all levels of ability.

Figure 5.13 - 99 Mile Trails

Figure 5.14 - 99 Mile Lit Trail

5.3 Infrastructure Evaluation

5.3.1 Accommodation / Room Supply

If the proposed trail system proceeds to completion as currently contemplated, the area will have a major, first class marketing tool to assist the improvement of year round visitor growth, particularly during the winter months. The provision of this market driven facility is, by itself, insufficient however, to ensure that the area becomes known as a desirable destination for both winter and non-winter visitors. It is of prime importance that the communities in which such activities are to take place and which represent the principal overnight locations for visitors provide a full range, scope and variety of accommodations, food and beverage opportunities, indoor and outdoor things to do, shopping, entertainment and cultural amenities. The services and facilities should all be of a standard consistent with the expectations of the target market visitor.

Accordingly, we have reviewed both minimum to full service motels, hotels and resort properties found within the study area. On this basis, we have identified an inventory of 238 rooms, 67 of which are included in 3 minimum service motel facilities, as being available for the year round overnight visitor. The community offers a range of facilities and amenities which are represented by operations included in our survey. We analyzed the various properties using selected criteria considered important by visitors. We concluded that:

- In general, motel and hotel facilities provided the minimum range and quality of services and amenities sought by the year round pleasure traveller;

- In the case of one full service hotel under new ownership, the results of their current efforts should provide a welcome addition to the one existing full service Village located operation;

- For a majority of operations, grounds maintenance and interior housekeeping were at acceptable levels, but improvements in both areas were required at one of the resort facilities in order to ensure a continuing share of lucrative resort markets and be perceived to provide better perceived value for money;

- Exterior landscaping at most operations should undergo some improvement and more sensitive attention for enhanced visual on-site marketing;

- In the case of full service operations, the quality and range of items provided through their gift shops should undergo review to adequately meet the needs of the more affluent year round visitor, particularly if increasing penetration of the overseas marketplace is to be effective.

Similarly, menus and wine lists need to become more sophisticated and flexible if increased visitation by non residents is to be effective and sustained. Effective marketing, crucial to the future and improving health of the Village, both by individual properties and the community are dealt with later in this report.

5.3.2 Supply Evaluation

In order to determine the overall market acceptability of room supply in the 100 and 108 Mile House area, we conducted an evaluation of all year round facilities, encompassing year round resorts, full service commercial and minimum service motels.

We developed an evaluation matrix recognizing that while in most cases our assessment criteria would apply to all properties, the weighting of some of these would be significantly different: i.e. food, beverage and the provision of in house recreation have little meaning to the marketplace for minimum service motels. Similarly, on site visibility, room rate and "family" room capacity are relatively more important for motel users than resort properties.

The results of our evaluations for motels, hotels and resort properties in the study area have been summarized on **Tables 5.3; 5.4 and 5.5;**

"Attainable Scores" comprise a mix of criteria which, based on our experience we deemed to be significant from the standpoint of marketplace acceptablility. Each was ascribed a factor of five: e.g.in the case of "Exterior" there were seven criteria considered.

"Potential Rank" represents what in our view is the relative ranking of each of the categories under review, from the standpoint of their importance to the marketplace. These add to 100%, with "Repairs and Maintenance" under the hotel accommodation supply evaluation table commanding an importance ranking of 15% of all criteria surveyed.

"Potential Score" is the multiplication of the number of operations surveyed, by the factor mentioned above, and by the potential score we ascribed to each. Potential scores varied by category. In the case of "Exterior" under the hotel table, there were two hotels, each with an attainable score of 35 for a total of 70, with a score potential of up to 10 per criterion (on seven criteria), for a total score potential of 700.

"Actual weighted average scores" summarises on a weighted average basis, the individual scores under each category, based on our fieldwork, which included interviews with facility operators. These were then "weighted" by the number of operations surveyed, for the totals shown.

"Actual weighted average rank" reflects the actual weighted average score per category, expressed as a ratio of the total actual weighted average score. The "total actual weighted average rank" represents the extent to which, in our view, the operations surveyed meet market place expectations. In the case of hotels, we felt that they meet expectations 70% of the time, based on the above stated assumptions.

Based on our assessment, we identified the following observations:

- In general, we found the basic provision of rooms, food, beverage and recreation to be acceptable, but at the lower end of the range of what we would consider desirable for the experienced visitor, looking for a quality nordic or non winter trails' oriented resort experience;

Table 5.3

HOTEL SUPPLY EVALUATION

HOTEL ACCOMMODATION SUPPLY EVALUATION
(PERCEIVED MARKET PLACE ACCEPTABILITY)

JULY 1991

CATEGORY	ATTAINABLE SCORES	POTENTIAL RANK % Hotels	SCORE #	ACTUAL WEIGHTED AVERAGE SCORES Hotels #	Rank %
Exterior	35.00	5.00	700.00	19.00	2.71
Facilities Mix	120.00	10.00	1200.00	47.00	3.92
Facilities aesthetics	50.00	5.00	1000.00	18.50	1.85
Housekeeping	5.00	15.00	33.33	5.50	16.50
Repairs/maintenance	5.00	15.00	33.33	5.00	15.00
Food and Beverage	50.00	10.00	500.00	31.00	6.20
Recreation	20.00	5.00	400.00	0.00	0.00
Service	10.00	15.00	66.67	8.00	12.00
Marketing	15.00	10.00	150.00	6.50	4.33
Operation	10.00	10.00	100.00	7.50	7.50
Total	320.00	100.00	4183.33	148.00	70.01

RESORT SUPPLY EVALUATION

Table 5.4

RESORT ACCOMMODATION SUPPLY EVALUATION
(PERCEIVED MARKET PLACE ACCEPTABILITY)

JULY 1991	POTENTIAL ATTAINABLE SCORES	RANK % Resorts	SCORE #	ACTUAL WEIGHTED AVERAGE SCORES Resorts #	Rank %
CATEGORY					
Exterior	35.00	5.00	700.00	14.50	2.07
Facilities Mix	120.00	7.50	1600.00	52.00	3.25
Facilities aesthetics	50.00	7.50	666.67	26.00	3.90
Housekeeping	5.00	15.00	33.33	4.50	13.50
Repairs/maintenance	5.00	15.00	33.33	3.50	10.50
Food and Beverage	50.00	7.50	666.67	28.00	4.20
Recreation	20.00	7.50	266.67	14.50	5.44
Service	10.00	15.00	66.67	7.50	11.25
Marketing	15.00	10.00	150.00	10.50	7.00
Operation	10.00	10.00	100.00	5.50	5.50
Total	320.00	100.00	4283.33	166.50	66.61

Table 5.5

MOTELSUPPLY EVALUATION

Destination Cross Country Ski Area 99 Mile to 108 Mile House *Masterplan*

MOTEL ACCOMMODATION SUPPLY EVALUATION
(PERCEIVED MARKET PLACE ACCEPTABILITY)

JULY 1991

CATEGORY	ATTAINABLE SCORES	POTENTIAL RANK % Motels	SCORE #	ACTUAL WEIGHTED AVERAGE SCORES Motels #	Rank %
Exterior	35.00	15.00	233.33	14.30	6.13
Facilities Mix	10.00	5.00	200.00	6.30	3.15
Facilities aesthetics	10.00	5.00	200.00	5.00	2.50
Housekeeping	5.00	20.00	25.00	5.70	22.80
Repairs/maintenance	5.00	20.00	25.00	5.70	22.80
Food and Beverage	0.00	0.00	0.00	0.00	#NUM!
Recreation	0.00	0.00	0.00	0.00	#NUM!
Service	10.00	15.00	66.67	6.70	10.05
Marketing	15.00	10.00	150.00	5.00	3.33
Operation	10.00	10.00	100.00	6.70	6.70
Total	100.00	100.00	1000.00	55.40	77.46

- Deficiencies in the minimum service motel community were found to in the area of exterior aesthetics, including exterior grounds landscaping, and marketing only, with room rates reflecting reasonable value for accommodation provided;

- We considered a ranking of 70% and above as an indication that inventory more than acceptably meets the needs of its principal target markets: between 60% and 70% needs are only adequately met, and below 60% needs are not met, with operations unable to effectively penetrate the seasonal marketplace;

- The motel inventory best meets the needs of its markets, followed by the full service hotels reviewed, at levels reflecting adequacy in market place satisfaction and resorts at the mid range of what is minimally acceptable.

It is likely that once the new owners of one of the Village's two full service commercial hotels have completed planned physical improvements, that these operations will represent the best value for accommodation in the community for their target markets. Operating professionalism and sensitivity to target market needs were at a higher level than our experience of the resorts in the survey;

- In the case of the 2 major resorts in the study area, there is a distinct difference in their character and market position. One facility offers a more "western", rustic look with grounds left in a more rugged, natural state and accommodation somewhat limited until planned expansion occurs. Surprisingly, in spite of some present site and facility limitations this resort has recorded high levels of occupancy on a year round basis, partly as a result of effective and targeted marketing.

- By contrast, the second facility has suffered somewhat from operating / management instability and poor target marketing as to its perceived image and identity. As these matters are slowly brought under control, we concluded that this facility has the potential to lead the region in its efforts to firmly establish itself as a desirable year round resort community.

- Notwithstanding, it was our view that current resort visitors are not being as well served as could be possible, and that major improvements both in operations and physical upgrading are needed to ensure that it will be compatible with the future "destination" resort aspiration of the Village, and to lessen what we perceived to be its vulnerability to future intervening opportunities;

While operations within resort communities such as Whistler and Banff offer a range of services from no frills motels to full service hotels and resorts, their location, "clustered" in well known destination areas permits even those with minimal facilities, downgraded quality and inferior marketing, to operate at optimum occupancy levels and average room rates during peak periods. The awareness of these communities in their marketplace more than adequately compensates for theses operations' deficiencies. By contrast, individual operations located outside these areas, in more rural, and particularly wilderness settings, require to be more target oriented, providing a range of precisely market driven indoor and outdoor amenities and things to do.

Individual properties aside, we concluded that the community must undergo a thorough review of its visitor amenities and services to determine what has to be done to re- position them for an economic share of the year round resort visitor. In addition, synergy potential between community facilities, services and events and the area's accommodation operations must be explored to identify the extent to which market planning may be developed and coordinated for optimum penetration of seasonal target markets. It is only with this concerted effort between the Village and its motel, hotel, resort inventory that it has a realistic chance to exploit its potential, and achieve what its individual components acting on their own would find cost prohibitive.

5.3.3 Rumoured and Planned Additions to Inventory

During the course of our fieldwork we identified several projects, which, if carried to completion, would increase the year round supply of full service hotel

accommodation in and around the Village. These have been summarized below, in point form:

- The Red Coach Inn, the Village's premier full service commercial hotel has acquired adjacent land on which to build an additional rooms' wing for 25 units. There would be no major changes to other existing facilities and amenities. Approvals and designs have been finalized. The decision to proceed is somewhat dependent on the strengthening of the year round marketplace, for economic support. It is our view that this plan is the most likely to proceed over the short term, of those reviewed;

- The Hills: located at 108 Mile. As a result of recent year's success in attracting visitors, management of this 20 unit chalet style resort has been persuaded to increase their accommodation by adding a 10 unit, free standing lodge to be completed by December 1991. This expansion will allow the resort to attract small groups and bus tour traffic.

- The Monocle Ranch has been bought by off shore interests. One rumoured plan is to develop part of the property as a destination hotel. Following discussions with a representative of the new owners, we determined that this was one of several alternative uses currently under consideration. For purposes of our work, we discounted this as a likely addition to inventory.

5.4 Summary Assessment of Regional Tourism Potential

Having presented an overview of the existing trails network and tourism infrastructure in the study area, it is of benefit to analyze how they compare within a destination framework. To do this in an objective manner, we have reused the "Destination Area Evaluation Matrix", developed by NGI and previously utilized in the 1988 BC Cross Country Ski Study.

For those unfamiliar with this tool, **Table 5.6** is included to illustrate the range of facilities and services that can be expected at a destination tourism area. Ratings are given in 16 Categories using the 10 point rating system described below.

What makes this product assessment unique is that it reflects a "perspective of trail use". The evaluation matrix and assessment criteria are based on a number of operational and physical factors common to most tourism areas, particularly if they include trails.

The matrix illustrates the range of facilities and services that can be expected at destination tourism areas. Ratings are given in 16 categories, using a 10 point scoring system:

- **Below average** (1-4 points) - poor image, quality, and commitment; not worth a repeat visit.
- **Average** (5-8 points) - probably worth a repeat visit; several outstanding qualities; potential is usually high.
- **Above average** (9-10 points) - well worth repeated visits; excellent reputation supported by quality of ski experience.

The matrix is designed to evaluate both winter and summer conditions. The following provides a brief definition of the various criteria:

Access Refers to ease of access to a destination area and includes such matters as signage, condition of roads, distance off major roads (to access activity zones), and safety (i.e. in terms of snow removal, etc.).

Aesthetics Relates to the overall combination of natural and manmade features the area offers, and the "balance" between them in order to distinguish the outdoor/trail experience.

Seasonality Identifies seasonal constraints (i.e. rain, bugs, etc.) and determines if an area can attract key holiday markets (i.e. Christmas, Easter, etc.).

Kilometers of Trail

Relates to overall scale of area, drawing power and absorption capacity. In the winter, it becomes a measure of the number of kilometers of "track/grooming" provided for skiing, snowmobiling.

Terrain Relates to the overall mix of terrain over which the trails are laid (i.e. is it all flat, open or too steep; is it more oriented towards advanced users or recreational users; is there separate and adequate teaching / instruction for skiing, hiking, mountain biking, etc.).

Trails Refers to the qualities of existing trail design and construction for specific cross-country uses. Includes surface conditions and slopes; drainage measures; snow retention ability and bridging.

Winter Grooming/Summer Maintenance

Refers to the quality and consistency of trail grooming and/or track setting (i.e.: no skating lane) in relation to use volume and general snow conditions, and the amount of maintenance provided in the summer.

Trail Facilities

Relates to the mix of buildings and physical facilities provided for the trail users including: base lodge; waxing facilities; warm-up shelters; back country shelters; parking, etc.

Services Relates to the range and quality of services an area provides for the destination visitor including rentals, retail, repair shop, day-care, food, guiding, outfitting, search and rescue.

Programs Relates to the variety and quality of different trail use programs an area offers (i.e. for women, youth, guiding, instruction, race-training, events, etc).

Accommodations

1. **On-Site** Refers to the type, variety, and number of beds provided directly on-site at the tourist area.
2. **Off-Site** Refers to the distance from the primary trail area and the variety and type of supplementary accommodation available for the destination trail user.

Other Recreational Activities

Relates to the variety and quality of complementary recreational activities offered to the destination visitor should he/she not wish to cross-country ski (i.e. snow shoeing, ice fishing, snowmobiling, sleigh rides, dog sledding, alpine skiing, snowplay, etc.) in winter or in summer hunt, fish, canoe or motorboat.

Other Tourist Attractions

Relates to the variety and quality of non-recreational sites and activities available to destination visitors (i.e. shopping opportunities, galleries and museums, historical sites, craft shops, cultural events, dining opportunity, etc.).

Operations Relates to the overall manner in which the ski area is managed and the "impressions" the destination visitor obtains (i.e. is there an appearance of professionalism and coordination between all area tourism elements).

Summer Business

Refers to the ability to provide a balance of recreational facilities and programs which are also compatible with winter activities.

TABLE 5.6
Destination Resort Evaluation Matrix

Category/Level of Development:	ABOVE AVERAGE (9-10)	AVERAGE (5-8)	BELOW AVERAGE (0-4)
ACCESS	Primary use area within 1 mile of excellent highway; large, conspicuous, attractive, multiple signs; constant road maintenance and snow removal in winter.	Primary use area within 3 m. of good highway; unobtrusive, weathered signs; roads cleared on "as needed" basis.	Primary use area 3 m. from highway; small signs, hardly visible, infrequent; roads cleared after storms.
AESTHETICS	Diverse and distinctive variety of natural features and landscape attributes, and carefully planned and sited manmade facilities in harmony and balance with the area.	Diverse and attractive natural settings, but siting and development quality of facilities incompatible with area.	Mundane, uninteresting landscape features, and/or in combination with unattractive incompatible manmade development.
SEASONALITY	Winter at least 3.5 month/105 days (includes Christmas) Summer solid 4 month season with consistent weather patterns	Winter 3 months/90 days (Xmas) Summer seasonal constraints	Winter 2-2.5 months/60-70 days Summer mainly July/August, climatic limitations
KMS. OF TRAIL	100/50+	75/30	50/15
TERRAIN	Has wide mix of terrain in use for all levels of with bias towards specific markets; specific ski school area and ski playgrounds as well as other instruction areas for mountain biking, etc.	Has some mix of terrain variety (hills, open flat areas) but not market oriented; ski school area, but poorly sited.	Has limited recreational use terrain with no product aimed at specific markets. No ski school instruction terrain.
TRAILS	Trails designed specifically for XC and other users: majority 2- way trails, skate lane, bridges, banked curves, sloping, drainage, good surfacing. Some lighted trails and snowmaking in the Northeast and Midwest.	Many trails cut for XC; 1 &2 way trails; some culverting and bridging; some areas wide enough for skating; annually brushing.	Adapted trails such as logging roads; poor drainage; informal bridging; bad exposures, i.e. windblown, tree melt.
GROOMING/ MAINTENANCE	Area operates state of the art grooming vehicles and implements with back-up for breakdowns, daily grooming schedule and full time specially trained groomers. Full summer maintenance program.	Grooming as needed, using non-specialized grooming vehicles or equipment unable to fully meet user needs or snow conditions. Inconsistent summer maintenance.	Grooming only after major storms or before weekend use, using inadequate equipment & inexperienced personnel. Non-existant summer maintenance.
TRAIL FACILITIES	Has full range of warm-up buildings, waxing shelters, day lodge to fully meet expanding skier trail user needs, sufficient toilet facilities for maximum use, good parking. Complete retail and rental shops.	Has limited waxing/warm-up facilites; day-lodge crowded on busy days; small rental/retail; insufficient washroom.	Has no waxing/warm-up facilities; no day-lodge; chemical toilets; no rental/ retail; limited parking, often poorly maintained.

(con't) **DESTINATION AREA ASSESSMENT GUIDELINES :**

Category/Level of Development:	ABOVE AVERAGE (9-10 value)	AVERAGE (5-8 value)	BELOW AVERAGE (0-4 value)
SERVICES	Is full service 7 days a week to meet total range of visitorr needs even at maximum capacity.	Has basic services but are overtaxed at peak use periods, service cutbacks during mid-week.	Has limited skier services, presented with inconsistent, unprofessional quality, cutbacks during week.
PROGRAMS	Offers a full range of programs for all identified trial user markets, using professional and well trained staff.	Offers full range, but staff over-taxed and not all trained, program cutbacks during mid-week.	Limited range of programs based on staff capability and inclination, and not what market wants.
ACCOMMODATIONS On-site	Primary area offers a wide range of lodging, and a variety of food services and other amenities (hot tubs, saunas, bar games room, etc.).	Offers a limited range of lodging with limited choice of food services and amenities.	Single choice of lodging, food service equals "hearty meals," no special amenities.
Off-site	Region offers a wide choice of accommodation type and price within 20 minutes' drive of the primary use area.	Offers wide choice of accommodation but nconvenient access (have to drive to primary staging area).	Limited choice of lodging, with questionable quality, inconvenient access.
OTHER RECREATIONAL ACTIVITIES	Full range of on-site or nearby (20 min.) winter recreation activities available 7 days a week (alpine, snowmobiling, dog sledding, sleigh rides, etc.).	Limited range of alternative winter activities with probable emphasis on weekend participation only.	Very few non-skiing recreation activities available on-site or in close proximity to main use area.
OTHER TOURISM ATTRACTIONS	Offer a wide choice of tourist attractions on-site and in easily accessible surrounding region.	Limited choice of other tourist activities on-site and in accessible surrounding area.	Limited choice but not easily accessible, not on-site and not always available mid-week.
OPERATIONS	Fully professional, friendly, versatile, and efficient, 7 days a week, consistent quality of specialized management (full time, paid staff).	Some professional staff, but friendly; some versatility; geared mostly to weekends; quality of operation can be inconsistent at peak times.	Composed largely of part-time staff (or volunteer) with little professional training or pride, size of area exceeds management's capability and number of staff.
SUMMER BUSINESS	Accommodations and facilities open 7 days a week, variety of programs.	Limited facilities. Weekend/holiday activities.	Little or no summer programming at any time. Poor facilities.

5.4.1 Regional Overview - Strengths and Weaknesses

Table 5.7 provides our evaluation of the 100 Mile to 108 Mile House area's existing tourism/trails products from a summer and winter perspective. This Table also provides our assessment, for competitive purposes, of other regional trail systems some of which were described in earlier reports. (See BC Cross Country Study, 1988) The data presents a critical evaluation/assessment of the existing trail products and areas available in the region. It is meant to provide an objective and professional judgement of what is currently in place and reflects existing levels of services, programs, attitudes, etc., as was related to the consultants both through our on-site assessment and personal interviews.

Table 5.7 illustrates why at the present time the 100 Mile to 108 Mile House area does not provide a true destination trail use image within the British Columbia market place. Individual components are obviously in place and some rate higher than others, but with an overall average score of **7.0**, the region is not yet comparable to such well-developed and organized destination areas as Jackson Ski Touring Foundation (N.H.) or high performance centres such as Hardwood Hills in Ontario. Closer to home, the 100 Mile to 108 Mile House product is not sufficiently different or unique in either overall product or quality to be significantly distinguishable from competing cross country ski destinations like the Methow Valley in Washington.

While the competing areas have only marginally higher ratings, they still attract competing markets with rates lower than the previously identified successful trail centres. Because there is a perceived lack of quality or value in the Cariboo area, most people will continue to visit those areas closer to home even though their "product value" is also, only average.

Until the overall visitor perception of the Cariboo trails product exceeds that of other competing areas, it will be difficult to market and attract trail users to the region. That is to say that the Cariboo region must develop its trail product so that it can achieve an above average rating (8.3 or higher).

TABLE 5.7
100 MILE HOUSE TRAIL EVALUATION & REGIONAL TRAIL SYSTEM COMPARISONS

Regional Trail System Comparison

AREA:	Jackson Touring,NH	Methow Valley, Wa	(Ore)Mt. Bachelor	Canmore Nordic,Ab	Hardwood Hills, Ont	99 Mile System	Red Coach System	The Hills/ 108System	Average of 100:108 Mile
CATEGORY:									
Access:	8.0	7.0	8.0	9.0	7.0	9.0	9.0	9.0	9.0
Aesthetics:	8.0	8.0	8.0	8.0	7.0	6.0	7.0	7.5	6.7
Seasonality:	8.0	8.0	8.0	7.5	8.0	7.0	6.0	6.0	6.3
Kilometres of Trail:	8.0	8.0	10.0	7.5	10.0	6.0	8.0	8.0	7.3
Terrain:	8.0	8.0	6.5	8.0	9.0	6.5	6.5	8.0	7.0
Trails:	7.0	8.0	9.0	8.0	9.0	9.0	6.0	7.0	7.3
Winter Grooming &									
Summer Maintenance:	8.0	9.0	10.0	9.0	10.0	8.0	8.0	7.5	7.8
Trail Facilities:	8.0	7.0	7.0	7.5	7.0	7.0	6.5	6.0	6.5
Services:	8.0	6.0	5.0	5.0	8.0	5.0	7.0	9.0	7.0
Programs:	8.0	6.0	6.0	3.0	8.0	6.0	6.5	7.0	6.5
Accommodations									
On Site:	9.0	n/a	n/a	n/a	8.0	n/a	7.0	7.0	7.0
Off Site:	9.0	8.0	7.0	7.0	8.0	7.0	n/a	n/a	7.0
Other Recreational Activities:	9.0	6.0	7.0	5.0	7.0	5.0	6.0	8.0	6.3
Other Tourism Attractions:	9.0	7.0	8.0	7.0	7.0	7.0	7.0	7.0	7.0
Operations:	8.0	8.0	9.0	8.5	10.0	7.0	7.0	7.0	7.0
Summer Business:	9.0	7.0	9.0	6.0	7.0	5.0	8.0	8.0	7.0
Average of Ratings:	8.3	7.4	8.0	7.1	8.1	6.7	7.0	7.5	7.0

Rating System: 1- 4 Below Average 5 - 8 Average 9-10 Above Average

The following discussion highlights our assessment of the 100 Mile to 108 Mile House trail product and identifies strengths and weaknesses within each category. The strengths mostly imply significant potential (to be examined in the concept stage); the weaknesses will prohibit meaningful visitation growth **unless addressed properly** -- in a long term development and marketing context.

Map 4 provides a graphic illustration of the Opportunities and Constraints found within the regional and community context.

ACCESS:

Strengths:

- all 3 areas have direct access off Hwy 97 the main route into the Cariboo, an all season Highway

Weakness:

- entrance to 99 Mile site could be enhanced
- Highway signage needs improvement
- apart from Heritage Site Staging area little direct access to trails

AESTHETICS:

Strengths:

- overall regional setting expansive with distant views, varied terrain

Weaknesses:

- individual trail areas reflect different levels of aesthetics
- no uniform trail standards/inconsistent signage
- Entranceways into 109 Mile House needs aesthetic improvements
- Market presentation of major tourism nodes/corridors lacks vivid aesthetic qualities that complement natural/historic setting of region

SEASONALITY

Strengths:

- seasonable temperatures all year ; ideal for wide range of outdoor activities

Legend

- VILLAGE AREA
- INDUSTRIAL LANDS
- PRIVATE LANDS
- EXISTING CABINS
- SECONDARY ROADS
- EXISTING TRAILS
- ABANDONED TRAILS
- BRIDGES
- ESCARPMENTS / RIDGE LINES
- SNOW RETENTION PROBLEM
- WIND PROBLEM
- STEEP AREAS
- VIEWS / VISTAS
- OPEN MEADOWS
- SPECIAL FEATURES
- CONFLICT AREAS
- LOGGING INFLUENCE

Notes

Bar scale 0 500 1000 1500 metres

N

Project 99 - 108 MILE SKI AREA MASTER PLAN

Map Title EXISTING CONDITIONS / OPPORTUNITIES & CONSTRAINTS

Project by NordicGroup International — ALBERTA MONTANA NEW HAMPSHIRE ONTARIO

Client B.C. MINISTRY OF TOURISM
100-108 MILE HOUSE, B.C.

Designed	B.D.
Drawn	L.P.
Checked	B.D.
Scale	1:20,000
Date	August 1991

File No.

Project No.

Sheet No. 4

Weakness:

- unreliable snow conditions at lower elevations (Red Coach, 108 System)

TERRAIN:

Strengths:

- between 3 main trail systems there is a diversity of terrain & variety of landscape offering many different views and points of interest
- terrain able to provide challenging trails for advanced skiers as well as gentle contours for easy or beginner interests
- compared to other ski areas, terrain in the 100 Mile - 108 Mile area does not appear to have major construction constraints

Weaknesses:

- terrain diversity not used to full potential , not enough interpretive trails
- trails at 99 Mile system are all challenging and not enough recreation, easy, family level trails (especially for unsuspecting destination visitors)
- landscape around 100 Mile House system not fully utilized to provide short, easy trails for entry level skiers/or non-winter hikers/walkers

TRAILS (kilometres/variety)

Strengths:

- total kilometres already in existence ranging from 167 km to 189 km (depending on mapping and field data used)
- If Holden Lake Marathon Trail included (although it is not regularly maintained) an additional 50 km of trail are available bringing the total trails to over 200 km , as is claimed by Cariboo Promotional Material
- offers FIS rated racing/competitive trails as well as recreational/touring trails

Weaknesses:

- Summer use potential of trails not well defined or provided for
- heavy reliance on bush roads, logging roads
- few individual trails for different activities (no dedicated nature walks (except demonstration forest trail); no special interpretive trail (in spite of using historic Cariboo Wagon Road)
- terrain gardens (play/instruction areas) off trail systems not well developed

TRAILS:

Strengths:

- at 99 Mile system, trails "engineered" in a professionally designed manner, comparable to several FIS & Race oriented trail systems in Western Canada
- most trails use existing or abandoned, but useable, logging roads making for wide, easily groomed trails
- parts of old Wagon Trail in good shape
- hiking trails along Bridge Creek in Centennial Park

Weaknesses:

- although many trails are "developed", they are in a rough graded condition
- few trails have proper drainage controls
- few are surfaced (or even compacted) for safe, low impact year-round use
- many trails, incl. 99 Mile's have rough edges, debris piles need cleaning
- parts of Marathon (M1) route passes by farm debris, logging debris
- some trails in the Red Coach and 108 Mile system are horse trails which need wider tread for a good skiing surface
- apart from the 99 Mile system, existing trails are generally indistinguishable from other trail systems
- no truly memorable trails exist; even the famous Cariboo Wagon Road is not highlighted or enhanced
- no evidence of handicapped accessible or designated trails
- no specialty trail construction (for other types of trail users); i.e. no boardwalks, no roller blading trails, etc.
- few trails have good multi-season appeal (i.e., no designated mountain biking trails, for instance)
- many winter ski trails are non-evident in the summer, because they simply cross open fields or meadows
- little tangible (non-winter) evidence of the areas 200 km trail system
- trails need to be better defined on the ground
- need for a "showcase" or "showpiece" trail, with photogenic appeal, that becomes the trademark for the 100 Mile-108 Mile area
- all trails are numbered, rather than named; makes for confusion
- too many intersections and loops with no real purpose of function

WINTER GROOMING/SUMMER MAINTENANCE:

Strengths:

- new, mid-sized snow groomers with power tiller has improved grooming capability and quality of trails
- dedicated grooming staff from local community who are knowledgeable about total trail system

Weaknesses:

- not enough manpower or equipment to keep all trails in "destination" quality or keep trails maintained in non-winter months
- insufficient summer maintenance keeps many trails in rough condition and unsuitable for non-winter use (except for equestrian use or more hardy trail users)

TRAIL FACILITIES:

Strengths:

- 99 Mile House system has an attractive Log Day Lodge
- 100 Mile House has the trademark giant skis
- both Red Coach and 108 Mile system (particularly at the Hills) have various trail side cabins/shelters
- 108 Heritage Site has washrooms, picnic facilities

Weaknesses:

- although area has a variety of trail side facilities/shelters, there is no **trademark** facility common to all that helps define the Cariboo trail system
- although 108 Heritage Site is an attractive rest area, it is not representative of a destination trail head at present but could, with the addition of a day lodge and better integration with the existing heritage buildings on site to increase visibility and potential for more program opportunities
- 100 Mile House, "as gateway to the trails" has no destination appeal, trail headquarters or staging area (like Pinkham Notch does for the Appalachian Trail in the White Mountains of New Hampshire)
- Chamber of Commerce Building attractive, but no relationship to trails, poor staging access to main trail areas

SERVICES:

Strengths:

- several area operators are widely respected for their hospitality and quality range of services regarding rentals, retails

Weaknesses:

- no overall ski area body providing a complete, coordinated range of trail services (i.e., like Jackson Touring Foundation, NH)
- no services/amenities at 99 Mile Trail system; except during events (i.e., visitors can't just go to 99 Mile and get a lesson)
- no coordinated guiding, need more "day-care"; coordinated patrol, search and rescue

PROGRAMS:

Strengths:

- generally found to be one of the area's major strengths, especially at the 108 system; the resorts there offer a mid range of trail, health and outdoor activity oriented programs to satisfy most groups and individuals
- ENDUCO SCHOOL offers a unique outdoor adventure range of opportunities

Weaknesses:

- lack of coordinated programming which ties in or augments the area's marketing themes ("true West", Cowboy Adventure, etc.)
- need to explore other program opportunities that take advantage of; Centennial Park Trails, Exeter Lake - 99 Mile Connector, etc.

ACCOMMODATIONS ON SITE (trail based):

A detailed assessment was provided in our Supply Evaluation, **Table 5.3.** This section provides a brief summary analysis within the context of the Matrix criteria.

ON-SITE:

Strengths:

- 3 strong properties anchor the 100 Mile-108 Mile area
- each offers a different style of accommodation
- each offers direct access to the trails

Weaknesses:

- not enough diversity in product (no group facilities - i.e., dorms) close by or on the trail system (i.e., ski cabins, yurts, etc.)
- existing on trail facilities need to champion a theme feature or activity/experience that distinguishes their product from other trail areas
- at present, this is not effectively accomplished (i.e., which type of cross-country skier do you want to attract or is your lodge accommodation most suited for?)

OFF-SITE

Strengths:

- "a wide number of other hotels, motels exist in the 100 Mile House area

Weaknesses:

- not all have bought into the trail theme or ski theme
- need upgrading, diversification
- better presentation of facility (i.e., through landscaping, upgrading coordinating with one another like Winthrop, WA has done so successfully).

OTHER RECREATION ACTIVITIES:

Strengths:

- numerous outfitters, guides, equestrian operators, etc) in the region offer a ready base from which to further expand program opportunities
- strong potential to develop snowmobiling in region
- opportunities close by to offer additional winter non-winter recreational experiences (i.e. - tours, heli-skiing/hiking, mountain bike, wagon trail)

Weaknesses:

- motorized use conflicts need to be resolved if trail system is going to gain a strong reputation for quality experiences
- no activities which really complement the heritage foundation of the trails (except trail riding).

OTHER TOURIST ATTRACTIONS:

Strengths

- opportunity to work cooperatively with the Forestry industry both public and private to expand forest interpretation programs, forest tours, etc
- area's hunting and fishing reputation
- area's scenery, setting, lakes, ie Green, Canim , Interlakes

Weaknesses

- area's major attraction - it's history - is largely undeveloped
- 100 Mile House has little to show of the famous Wagon Road, Stopping Houses, etc. except for the few relocated buildings at the 108 Heritage Site
- area's major reputation built on one event, the Cariboo Marathon, need to expand on that with Mini "FUN" events leading up to a **BIG EVENT,** (i.e. coordinate a complementary summertime Cariboo Mountain Bike Marathon as the first one of its kind in Canada, or Tri-athalons)

OPERATIONS:

Strengths

- Strong support for major trail system anchors
- Strong volunteer base

Weaknesses

- most of the trail work is being done by 2 or 3 people only. A destination quality trail system will require a full complement of trail crews, grooming crews as well as marketing and programming staff.
- need more grooming machines and trained operators
- need higher profile operations staff to become trail ambassadors

OTHER/SEASONAL BUSINESS

Strengths

- Majority of tourists coming to the Cariboo in the summer for hunting, fishing, camping, and trail riding
- Area is well known and has a clear image that is well marketed

Weaknesses

- need to better inform the summer visitors of winter trail opportunities
- need to provide more family recreation opportunities, (i.e. both 108 and the Hills could use better children play and activity areas)
- need more picnic areas/rest stops to get people out of cars and onto trails

Although this assessment may seem at first critical, it is intended to stimulate the senses to imagine what can be accomplished to make the 100 Mile to 108 Mile House Area a truly distinguished "experience" as a tourist destination and trail use area.

We feel that much of the area reflects a "take-it-for-granted" attitude towards the existing trails based on the traditional tourist opportunities (i.e. hunting, fishing, canoeing that don't require much development) while failing to really take hold of the resource potential and market opportunities.

In summary, the regional setting of the Cariboo is beautiful, the terrain and seasonality excellent for a wide range of trail-based activities and the region has a unique history and heritage. This we refer to as the complementary products. The problem that becomes evident is that the primary products for all seasons trail use are not yet fully in place.

In order for the region to increase its visitor profile based on a trail system attraction, there are sufficient strengths that can be worked on in terms of potential to create a unique tourism generator.

5.4.2 Trail Development Constraints / Issues

While the region offers a wide range of worthwhile trail development opportunities, a variety of issues and constraints exist that require a committed strategy to overcome.

- **Trail Product - Standards**

Although our inventory was limited in assessing every trail identified within the region, it is clear the existing trail product varies considerably in terms of design, layout, construction, scenic / aesthetic quality and physical carrying capacity. While some trails are more professionally laid out and constructed to a designated standard (i.e., the 99 Mile House nordic trails built to FIS standards), the majority of trails remain simple pathways across the landscape. For equestrian riders who generally follow paths no wider than 18" - 24" tread, the effect of trail standards may not be so important, except where drainage becomes a problem. Motorized users primarily follow forestry roads, cut lines and utility corridors, which often have limited scenic value. The extensive 200 km cross-country ski network in the 100 - 108 Mile House area also largely follows existing roads or crosses open fields. High quality grooming equipment provides a reasonable groomed trail during the ski season; however, because of lack of funds for proper planning and trail construction these trails still exhibit route location, trail design and sun exposure problems and have limited appeal for full spectrum, year round use.

The Hills Health Ranch has developed a separate 27 km trail system that offers a diversity of trail experiences that utilizes the total available acreage to its full capacity. A lack of construction funds has also restricted the overall quality of trail product.

In the backcountry locations, trail standards are even more loosely applied, ranging from old roads that need repair to swaths cut through the vegetation with no drainage or erosion controls put in place. It is recognized that many trails have been built by trappers and outfitters using simple, traditional methods who prefer to keep their trails in rough condition to discourage other users.

Such trail standards can be fairly basic for an equestrian trail or winter snowmobile trail but for non-winter, non-motorized uses such as hiking, mountain biking or in winter cross-country skiing, the trail quality should attempt to achieve a more sophisticated standard, especially in terms of aesthetic value and environmental impact to increase the appeal and capture of destination skiers and to minimize long term maintenance costs.

Another major constraint throughout the region is the overall lack of "security" trails have. This is partly seen as the reason trail standards are not being maintained. Apart from the few developed cross-country ski areas in 99 Mile House and the trail elements provided around the 100 - 108 Mile House system, most trails leave no formal or recognized designated use. Trail locations change from year to year depending on other land use priorities such as logging.

- **Trail Mix**

It was noted that there was an apparent shortage of short (1.5 - 3 km), non-motorized nature / interpretive oriented trails in the region. Yet places such as; Quesnel Forks, Likely, the Interlakes all have features which could be more readily accessed and enjoyed by visitors by a mix of short, day-use trails.

The overall mix and availability of medium to longer length trails in the region is quite extensive. There are countless opportunities for shorter trails, which combined with the promotion of auto circle tours, would provide a variety of interesting rest stops to view specific points of interest in the Cariboo. Seasonal commercial ventures (concessions, crafts, fruit stands, etc.) could compliment and support short trail development.

- **Trail Use Conflicts**

In any area where there is a wide range of trail opportunities but little management or organization, trail use conflicts will occur. Discussions with interest groups throughout the study area and the survey results have identified a variety of trail use conflicts. Primarily they are snowmobiling vs. cross-country skiing; hiking vs. ATV / dirt bike; and equestrian vs. motorized use. Even with designated trails such as the 100 - 108 Mile House cross-country ski trail system, abuse by snowmobiles remains a concern. Such conflict can be largely mitigated through education and awareness programs to ensure that

local users are registered with a trail club or organization willing to share some responsibility over the patrol and maintenance of trail networks.

- **Trail Access**

Although the area has a solid network of trails in place, most of which have permanently registered rights-of-way, certain types of trail expansion, particularly long distance trails connecting into other trail areas, might face some impediments due to restricted access over private lands. Access is constrained along Highway 97 and Highway 24 corridors where trails must cross private lands or lands that are leased for ranching. Landowner concerns are related to concerns such as: noise created by users; not shutting livestock gates, vandalizing; or simply infringing on private property. A continuing concern why private landowners remain reluctant to permitting trail development and access across their lands is their concern over landowner liability should a trail user cause damage or injure themselves on private land. This problem is being addressed in various U.S. states and Ontario where landowner laws are being changed to public liability, making the trail user (or trespasser) responsible for damages or injury. A waiver system could also be used to address skier liability (Appendix). In addition, a system of land use agreements could be set up to mitigate liability concerns.

Outside of privately controlled lands, trail users must also contend with trail access constraints on Crown land. Logging takes precedence over other uses except in a few isolated areas being considered for park or wilderness status. Although the Ministry of Forests promotes multiple use of the Crown land it administers, there are historic difficulties in mixing recreation (trail) use and active logging, mainly due to safety hazards. Discussions with a representative from the Cariboo Lumber Manufacturers Association suggest an openness to provide and develop a better relationship once a coordinated trail network is put in place.

- **Jurisdictional Constraints**

With almost 80 percent of the existing trails in the area located on private lands having registered rights-of way, it is felt that most access issues can be readily resolved. In the event that there becomes a need or a requirement to further expand trail development

into public land areas,(i.e. as on the "benchlands" around 99 Mile House trails) then access issues will require resolution involving the Ministry of Forests.

Much of the Crown land within the study area is managed by the British Columbia Ministry of Forests which has a number of districts in the study area. Occasionally, interpretation of Forest Service Regulations varies from District to District, particularly when describing what constitutes a "public trail" and a trail having commercial use (or potential trail user fee). With no designated standards for trail development and no system to protect trail corridors, it is difficult to develop an integrated network which is consistent in standard and use potential.

The most appropriate solution in this regard may be to establish registered rights of way with clear and specific guidelines for use similar to those established for the trail guides and outfitters operating in the Province of British Columbia.

In addition to Ministry of Forest constraints, it is recognized that a number of other government agencies have or are vying for control of Crown lands including:

- Ministry of Crown Lands
- Ministry of Parks
- Ministry of Environment
- Ministry of Transportation
- Ministry of Tourism

Frequently the interpretation of Ministry policies related to meeting goals and objectives varies from one agency to another. There is no provincial trail policy identifying agreed upon standards and trail corridor designations: each agency follows their own guidelines and standards and privately developed trails by groups or individuals have no guidelines. Without a policy in place it will be difficult to achieve a coordinated integrated trail system having uniform standards for construction, maintenance and operation.

6.0 DEVELOPMENT CONCEPT

Having reviewed and analyzed the existing trails and supporting infrastructure product within the 100 Mile to 108 Mile Study area, this section provides our ideas regarding how the area can expand its opportunities and increase its share of winter destination skiers.

While our assessment of the existing product may be critical, the overall potential is better than at first realized. The major problem with the 100 Mile to 108 Mile House trail system is that many of the existing trails are in a rough condition and need various levels of upgrading and definition to further highlight their opportunities and trail experience potential. This upgrading needs to be fully and seamlessly integrated into a fresh marketing concept.

At issue is the concern of how effectively the trails are being used. At present we believe that the full potential for program and trail activity use cannot be realized without countering the major issue as noted above. Part of this problem stems from the fact that there is no strong coordinating development theme or consistent trail standard, nor is there a strong identifiable image of the existing trails created in the visitors minds, particularly in the non winter season.

The concept plan, therefore, provides the means to create a more focussed image. It gives an opportunity to finesse the details associated with professional trail planning and construction that ensures the creation of a memorable end product. In essence it is our opinion that the only drawback to the existing system is its need to be finessed, and its need to acquire a trademark / or signature identity and character which distinguishes the Cariboo from competing trail areas.

We feel that the 100 Mile to 108 Mile House area has a real opportunity to build on its culture, history, heritage, and folklore as well as its resource situation to develop an exemplary trail system that will win its reputation from:

- Outstanding quality and "Memorability"
- Comprehensive choice of activity opportunities, ie special trails for sleighrides, dog sledding, training, etc.
- Commitment to partnership that produces and ensures product consistency

By developing or upgrading the network of trails with a strong emphasis on

- Visitor Orientation
- Skill Development
- Trail Management and Control
- Resource Appreciation
- Visitor Services; and

it will be possible to more readily achieve the desired result of having the area become a major destination nordic ski centre and year round trail use area with overall increased tourism visits.

In order to illustrate the wide range of opportunities available to further expand and upgrade the 100 Mile - 108 Mile trail system to attract increased destination visitor use, we have developed two concept plans as follows;

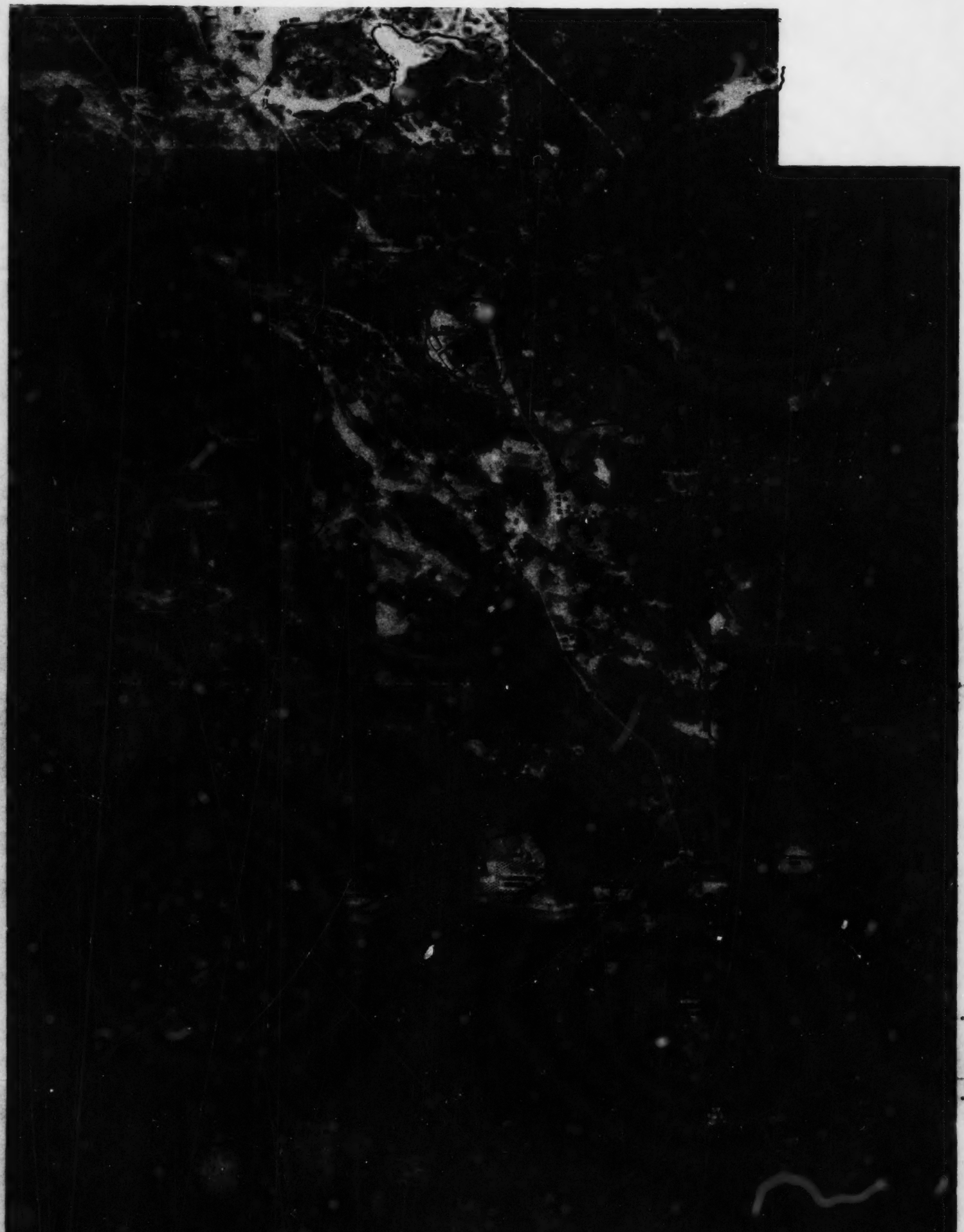
- **Map 5** illustrates the proposed overall **regional trails network concept;** and
- **Map 6** presents the concept for the heart of the trail system based in the **Village of 100 Mile House.**

The following gives a descriptive overview of each concept.

6.1 Regional Concept

At first, it was felt that the region should concentrate on developing a large number of new trails that would dramatically increase overall trail mileage. In this way, the area could market itself as the "largest trail system in Canada". However, after evaluating the existing trails there already is in place a significant number of trail kilometres. **Increased trail distances will not necessarily increase trail visitation. Improving existing conditions to provide a wider range of trail opportunities, establish stronger visual images of high quality trails that create stronger trail use memories will be more successful in increasing trail use.**

At the regional level, the key components that should be concentrated on and are graphically depicted on **Map 5**, include the following:



Legend

- VILLAGE AREA
- INDUSTRIAL LANDS
- PRIVATE LANDS
- EXISTING CABINS
- SECONDARY ROADS
- EXISTING TRAILS
- ABANDONED TRAILS
- BRIDGES

Notes

- PRIMARY STAGING (non-motorized)
- PRIMARY STAGING (motorized - snowmobile)
- SECONDARY STAGING (non-motorized)
- SECONDARY STAGING (motorized - snowmobile)
- PRIMARY - CARIBOO TRAIL (non-motorized)
- SNOWMOBILE LINKAGE
- HIGH ELEVATION TRAIL (non - motorized, recreational skiing)

Project **99 - 108 MILE SKI AREA MASTER PLAN**

Bar scale 0 500 1000 1500 metres

Map Title EXISTING CONDITIONS / REGIONAL - CONCEPT PLAN

Project by NordicGroup Northwest ALBERTA MONTANA NEW HAMPSHIRE ONTARIO

Client B.C. MINISTRY OF TOURISM 100-108 MILE HOUSE, B.C.

Designed	B.D.	File No.	
Drawn	L.P.	Project No.	
Checked	B.D.		
Scale	1:20,000	Sheet No.	5
Date	August 1991		

- **STAGING FACILITIES**

- **Primary Staging Areas (Non Motorized Use)**

These are seen to be the "gateways" to the trails. Places that are visible and accessible on a year round basis that entice and invite people onto the trail system. Several primary staging areas are identified as follows:

a) **99 Mile House Trail System.** With most of the infrastructure in place, parking, power, and a new day lodge, this site could be further developed to become a major year round trail activity centre. Upgrading the site in terms of landscaping, signage and creating some other functional spaces (i.e. biathlon course, climbing course, interpretive program space) will help to increase its appeal for more users.

b) **108 Heritage Site.** Serves as the northern gateway. Improvements to this site in terms of better signage and a trail staging facility or shelter will give it greater visibility as a staging area, particularily from the Highway. Such a facility could be integrated with one of the existing heritage buildings or be a separate structure. Minimum space might initially be about 2,500 sq. feet and as use increases expand as required.

c) **The Hills.** A large highly visible area with a mix of vegetation and terrain was identified on the Hills property where trail #10 crosses Highway 97 across from the landing strip. It is felt that this area could become a major activity centre providing additional parking and trail staging access for the 108 / Hills Trail system. This site could also include a terrain garden, instructional and play area, and become a major trail intersecting point.

- **Primary Staging Area (Motorized)**

In an effort to mitigate conflicts with motorized trail users, (i.e.primarily snowmobiles), it is felt that community relations can be improved by recognizing specific snowmobile use requirements; but more importantly to also provide additional revenue

potential to the area from snowmobiling. The concept proposes two major staging areas be developed to provide the snowmobilers a separate access to their trails and a place to hold events. These two areas are:

a) **99 Mile Race Oval** which is an existing snowmobile staging facility which could be upgraded to attract more use.

b) The old **100 Mile House Ski Hill.** With the hill being abandoned and its location providing direct access to several snowmobiling corridors extending east from 100 Mile House, we feel that this site has tremendous potential to meet most local snowmobile needs. In addition the site could become an attraction of a snowmobile HILL CLIMB type of event,(i.e. similar to the SnowKing Mountain Annual Hill Climb in Jackson Hole, Wyoming, which is now televised annually on Wide World of Sports).

- **Secondary Staging Area (Non Motorized)**

These areas would likely be less developed in terms of parking and facility structures or are intended to serve a more specific trail use function. Two identified areas are as follows:

a) **Chamber of Commerce Site.** This area is too small and has limited parking and overall trail access to become a major trail staging area; but with the adjacent Ducks Unlimited pond and a scenic roadside setting it is ideally suited for short nature walks and to serve as a rest area. With proper signage it can also encourage short term visitors to "walk through the village" and to see other sites of interest that could be reached by trail. Ideally, this site should provide parking for 20 cars and a few busses.

b) **Centennial Park.** This park must be almost unknown to most visitors and yet has tremendous charm and potential appeal. A more formalized staging area in this location would be ideal for outdoor programming, and coordinating hikes, along the Bridge Creek Trail System. This park area also can offer a community based instruction area.

- **Trail Headquarters**

At present there is no single facility which adequately serves as a trail information centre or a facility which can serve as a trail program information and instruction / education centre similar to the famous Pinkham Notch facility in the White Mountains of New Hampshire and the home of the Appalachian Trail. That facility is over 5,000 sq. ft large with meeting rooms, office / retail space, change rooms and separate dormitory buildings that can house 60 people (i.e. school groups).

It is felt that the area across from the Red Coach Inn, adjacent to the Bridge Creek Barn has the space and visibility, as well as trail access potential to be developed into the signature Cariboo Trail Headquarters facility. The building envisaged for the site could be designed to cost share its development with various commercial retail tenants and could include rental shops, or trail outfitters, etc.. The facility could have a "log" construction motive similar to the new day lodge built at the 99 Mile Nordic trails and initially be about 3,500 sq. ft in size offering office space, ticketing area, display areas and an A/V / programming room. This site and proposed facility would also become the major outdoor activity staging area within the village of 100 Mile House.

- **TRAILS**

- **Primary Trail**

We feel that the majority of the Cariboo's existing trails are readily useable if properly upgraded and signed. What is missing is a "Showpiece" Trail that is visible from the road and is easily accessible for all users; a trail that provides a common theme connecting the different trail systems. That trail we feel should be the **Cariboo Wagon Trail** which is still in useable form for about 4 Kms between the 108 Resort and the Hills property. As identified on the accompanying maps parts of this trail should be re-routed to a slightly higher elevation (i.e. 1000 metre level) and to a more protected area to help reduce exposure probelms. We also feel that the area's primary Marathon Route (M1) should be upgraded to a uniform standard throughout to become the showpiece trail linking the Cariboo.

The total length of this Primary Trail connector is about 20 kms of which 16 kms are existing and a further 4 kms are suggested to be newly developed trails located in better snow retention areas.

The theme for this Primary Trail could be something like "The Cariboo Heritage Trail" or "The Golden Nugget Trail".

- **108 - The Hills Lit Trail Circuit**

The existing lit trail at the 108 Resort should be upgraded and extended to the Heritage Site and to the Hills. If developed, it would provide about a 5 kilometre lit loop trail that would encourage increased skier use between the two resort properties.

- **Highway 97 Tunnel**

A second trail tunnel crossing Highway 97 near the airstrip is suggested to create a safe circuit for trail users between the 108 Resort and the Hills Guest Ranch. In addition, the development of this tunnel could be used as a major marketing tool further enhancing the "trail identity" the region is trying to establish.

- **Shelters**

Shelters placed along a trail system can become "trademarks" for a particular region; can also serve a variety of program functions and assist in increasing the range of trail activity opportunities that the area can promote (i.e. hut to hut treks, overnight tours). Shelters can also have day use or overnight interpretive/outdoor education functions. Ideally, such structures might have their own distinct design or simply be a log cabin or 3 sided Adirondack style.

The regional concept identifies the location of several trail shelters that try to take advantage of scenic or strategic locations as along the Marathon route overlooking 103 Lake and in the meadow area near the 99 Mile connecting trail railway crossing.

Legend

- NEW TRAIL, MULTI-USE TRAIL (non-motorized)
- UPGRADED, MULTI-USE TRAIL (non-motorized)
- URBAN TRAIL
- MOTORIZED TRAIL

Notes

Project **99 - 108 MILE SKI AREA MASTER PLAN**

Bar Scale 0 50 100 150 300 metres

Map Title COMMUNITY - EXISTING CONDITIONS / CONCEPT PLAN

Project By

Client B.C. MINISTRY OF TOURISM
100-108 MILE HOUSE, B.C.

Designed
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Date

File No.
Project No.
Sheet No. 6

6.2 Community Trail Concept

We feel it is important that if the area is to become further recognized for its trail product than the Village must exemplify a trail use image. This can be demonstrated by promoting greater trail use by village residents, including trail based activities and skiing instruction within the school curriculum and showing a general commitment to trail development. (One only has to think of such cities as OSLO, Norway...where trail use is an integral part of community life and a major trademark of that city).

In this regard, it is important for the Village itself to take trail development more seriously by providing more opportunities for people to circulate in and around the community on designated trails,(i.e. the OSLO of the Cariboo). While it seems rather simplistic, it should be pointed out that no city in Canada has yet to demonstrate such a commitment to trail use and if the 100 Mile House area truly believes it has a superior trail product of sufficient quality to become a major destination attraction...there is no better way to promote that fact than by creating an attractive community trail system.

The community concept , graphically illustrated on **Map 6** identifies a number of new and upgraded trail development opportunities that can further enhance the Village's trail orientation including the following:

a) **Ducks Unlimited Pond** - This should be a "showpiece trail", multi use, starting from the Chamber of Commerce Building. Features such as a boardwalk (**Figure 6.1**), a dip net dock for children (**Figure 6.2**) and a waterfowl viewing tower (**Figure 6.3**) could be considered.

b) **Bridge Creek - Little Bridge Creek Trails.** Trails along Little Bridge Creek between the Red Coach Inn and Bridge Creek Ranch should be developed to provide a greater circulation around the village

c) **Other Community Trails.** Should develop between the Red Coach Inn and the High School and the connecting trail to the 99 Mile system.

Figure 6.1 Boardwalk

d) **Urban Trail Development.** The Village should develop a designated trail and pathway system connecting the key points of interest within the community. This trail should be built to high year round, multi use standard and should provide a easy pedestrian circulation to the Village Main Street, the Trail Headquarters Facility and the Centennial Park Trails. Parts of this trail should have some themed construction in form of ; interlocking paving stones, streetscaping and/or signage that clearly identifies the trail and its purpose.

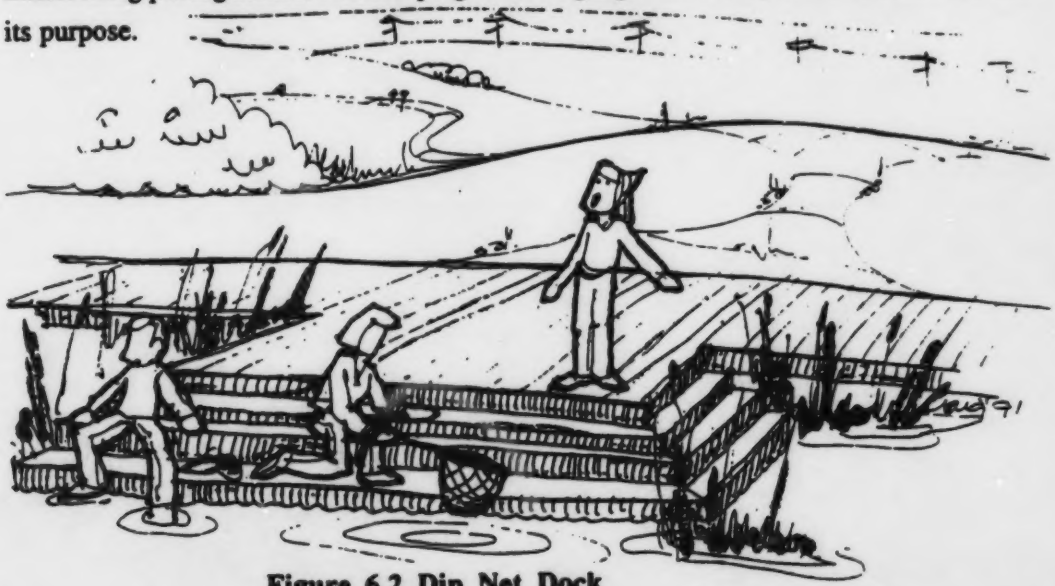


Figure 6.2 Dip Net Dock

Figure 6.3 Watch Tower

e) **Motorized Use Trails.** Designated routes for motorized, snowmobile travel, should be developed. Where potential conflict areas occur, (i.e. Willowdale Trail Crossing, hydro line corridor connector,) techniques such as snake fence barriers can be developed to ensure the separation of uses.

The Community Concept Plan also identifies another "trademark structure" that can intrigue visitors and attract them to stop and see what it is. We are proposing a **trail watchtower** similar to the Forestry Tower in Quesnel (**Figure 6.4**) or the Lookout Tower on Green Mountain in Wells Gray Park. The tower should be sighted to overlook the Duck Pond and be visible from the 99 Mile Hill. It would complement the upgraded nature walk proposed around the lake and provide a further attraction for people to stop and take a picture and learn about the trail opportunities in the community and the region.

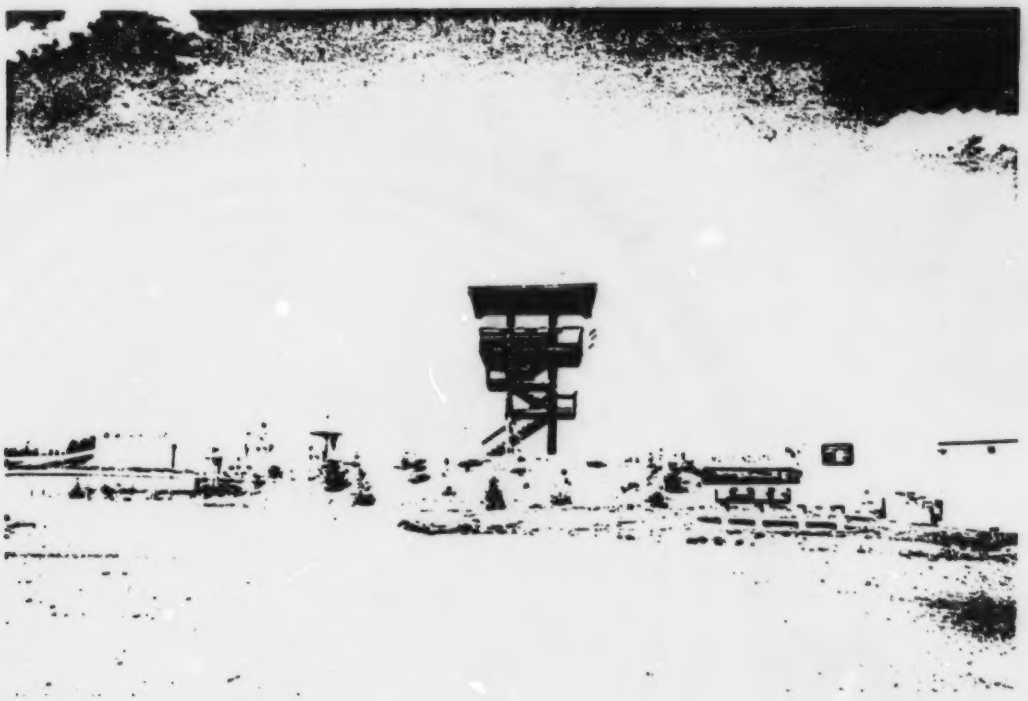


Figure 6.4 Quesnel Forestry Tower

6.3 Special Features

- **Fence Gates** - One of the major problems in obtaining the endorsement for trail linkages especially across grazing areas (in non winter seasons) is the issue of fence crossings (i.e. landowners are concerned that trail gates would be left open and that cattle would wander). The proposed concept recognizes that this is a major concern and has developed a unique design incorporating the 100 Mile House "Giant Skis" profile into a functional multi purpose gate design that would have a self closing feature. The gate itself would be functional in winter and non-winter seasons...and in itself become a trademark symbol of the Cariboo Trail System **(Figure 6.5).**

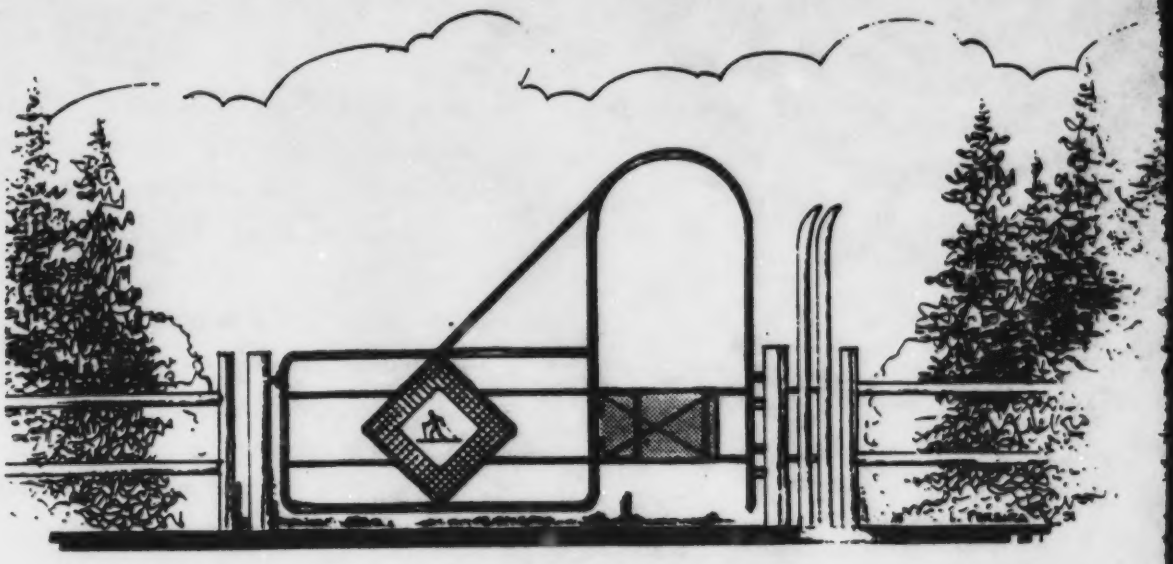


Figure 6.5 Cariboo Fence Gate Design

Figure 6.6 Cariboo "Gateway" Signage

- **Trail Gateways Signage** - Each major trail should have symbolic gateway or archway for users to proceed through on to the trail system which could become another trademark symbol of the Cariboo trails system **(Figure 6.6)**. In addition, it is important that the total trail system incorporates quality improved signage along all the trails and particularly at trail heads or staging areas. This includes using easy to read, colourful, themed signage that starts with a proper overall TRAIL SYSTEM MAP. We also recommend that the area reexamine its policy of numbering trails and instead opt to name or otherwise identify the trails with more memorable and colourful names that can build on the area's history and overall themes for tourism (i.e. Golden Nugget, Sluicebox, Timber Creek, RoadHouse, etc.). **Figure 6.7** below illustrates an attractive signage motive used in the nearby community of Quesnel.

Figure 6.7
Sample Trail Signage

6.4 Preliminary Development Cost Estimates

Based on our extensive field investigations and assessment of requirements needed to improve and expand the area's trail opportunities and overall trail identity, we have estimated for discussion purposes potential development costs to implement the proposed concept. These costs are summarized on **Table 6.4**.

Specific details regarding trail design criteria and construction standards upon which some of our cost estimates have been based are described in the following sections. As well, we have taken into account costs which have been incurred for similar types of trail development projects in other communities or regions. It is recognized that any of these costs can fluctuate pending local conditions and factors at the time of construction . A more specific projection can be developed upon completion of detailed design specifications which is recommended before construction proceeds.

As indicated on the Table, costs for upgrading and expanding the trails have been estimated to be approximately $226,000 within the village and $260,000 within the regional trail network. A further $155,000 has been allocated for the improvement and development of trail staging areas. Other trail amenities such as signage, shelters and fence gates are estimated to cost a further $120,000. Three Hundred thousand dollars have been allocated for the development of a major Trail headquarters facility (hopefully to be built on a shared basis with some other tenants to reduce overall costs) and a new tunnel crossing Highway 97. Total costs to initiate and implement the concept outlined herein is estimated to be **$1,200,000.00.**

TABLE 6.4
ESTIMATED DEVELOPMENT COSTS

COMPONENT	UNIT	QUANTITY	COST	TOTAL
Trail Development - Community				
Multi Use - Upgrade Trails	m	6000	$2.25	$13,500
Multi Use - New Trails				
• Nature Walk (boardwalk)	m	1500	$25	37,500
• Multi Use	m	2500	$10	25,000
Urban Trail - Multi Use	m	4000	$25	100,000
Watchtower	ea	1	lump	50,000
Trail Development - Region				
Multi Use, Upgrade	km	130	$1000	130,000
Multi Use New Trail	km	6	$5000	30,000
Lit Trail				50,000
Marathon Trail (High Elevation)	km	25	$2000	50,000
Primary Staging				
• 108 Heritage Site				35,000
• 99 Mile Site				35,000
• The Hills				35,000
Secondary Staging				
• Centennial Park				15,000
• Chamber of Commerce				25,000
Trail Headquarters/Bridge Creek				150,000
Highway 97 Tunnel estimate				150,000
Trail Amenities and Signage				
• Shelters	ea	2	5000	10,000
• Upgrading Shelters	ea	4	1500	6,000
• Trail Head	ea	8	5000	40,000
• Trail Signage				15,000
• Trail Archways	ea	6	3000	18,000
• Fence Crossing Gates	ea	min 20	1500	30,000
Total Trail Development Related				**$1,050,000**
Estimated Operating System	Trail Groomers	2	75000	150,000
TOTAL Budget				**$1,200,000**

7.0 ORGANIZATION / OPERATIONAL CONSIDERATIONS

Successful, multi-season, destination resorts demand responsive management systems with interdisciplinary capabilities that provide fluid seasonal transitions. This is especially true if an area is trying to be recognized as a 'world class' cross country ski destination vying for a diverse and discerning market.

In presenting a development plan for the 100 Mile - 108 Mile area, a complimentary level of operations/management will have to be achieved that currently is not in place. Prior to developing final cost schedules and pro forma statements, decisions on the scale of operations and development would have to be made.

This section defines operational aspects identified by NGI which should be considered within the context of the total physical plan and presents an organization structure to achieve it.

7.1 Organization

The Trailblazer Study recently completed for the Cariboo Tourist Association recommends an overall Regional Trail Foundation be established to coordinate the implementation of an integrated regional trails network that represents the interests of all trail groups in the Cariboo. This organization is seen to be NON PROFIT in scope because of the diverse interests it will be representing and the advantage this status might give in mitigating landowner concerns. The primary function is seen to be largely marketing and promotion oriented, although initially this organization would also coordinate the development and upgrading of existing trails within the study region.

Within that framework it is suggested that individual communities or trail activity areas establish their own "local" organizations oriented more to developing their facilities but in a coordinated fashion within the overall region. Such is the case recommended for the 100 Mile - 108 Mile House area. If the plan presented in this report is to succeed in increasing this area's recognition as a major destination ski area, specific operations geared to developing and maintaining the more than 200 kilometres of trail on a year round basis will have to be put in place. It is suggested that the 100 Mile House area establish a designated Trails Business Office which is affiliated with the overall Regional Trail

Foundation. This affiliation will provide a stronger marketing identity for the Cariboo region and can benefit from cost sharing of marketing initiatives and possibly other aspects of trail development and operations. In addition, it will help to create a common THEME throughout the region that all visitors will be able to relate to.

7.1.1 Trail Organization Review

In order to determine how the 100 Mile House Trail Foundation might be established we undertook a review of other trail based organizations. **Table 7.1** summarizes our key findings.

One of the more successful is that of the JACKSON SKI TOURING FOUNDATION in Jackson, New Hampshire. This organization has existed for 20 years and today operates with a staff of 14 - 16 individuals on a $250,000 annual budget. The Organization's ONLY responsibility is to develop and maintain the more than 150 kilometres of trails that provide skiing opportunities within the region and connect over 25 inns, lodges, etc. The marketing of the area's trails and tourism facilities has become the responsibility of the Chamber of Commerce and the private sector operators. Today, the area generates over 60,000 skier visits and has a season's pass membership of 1000. Jackson Touring Foundation receives NO funding assistance from government. Trails were initially developed with dollars put in by the private property owners and by issuing bonds. Interestingly, the Foundation is structured as a NON PROFIT society in order to secure the trail easements they require from more than 80 landowners. As a Non Profit organization, they are NOT permitted to delve in any activities EXCEPT THOSE DIRECTLY RELATED TO THE TRAILS (i.e maintenance, grooming etc.). In this regard, they are not even permitted to sell T-Shirts, or give lessons, rentals or other services. Those aspects are entirely left to private sector interests. The Foundation, generates its total operating budget from the sale of trail fees and a few miscellaneous items including donations. Day use trail fees were $9.00 US in 1991. The income generated is so great that they are able to put aside $30 - $50,000 per year into an equipment fund and recently were able to purchase 2 new Piston Bully 130's. In addition, because of their non profit status, they were the recipient of a parcel of land on which they now intend to build a new day lodge for season pass members.

Table 7.1 Comparative Organization Summary

COMPARATIVE ORGANIZATION

Name / Location	Length of Trail (Kms)	Type of Organization	# of Staff	Operating Budget	Revenue (Trail fees)	Market Area	# of Skier Visits	Trail Fees
Jackson Ski Touring/ New Hampshire	100 +	Non Profit	14-16 Winter 4 Fulltime	$200,000	$250,000+	100-150 Kms Boston-Portland	60,000+	$ 50 Season Day $9
Methow Valley/ Washington	150 + 20 expansion	Non Profit Regular Corp Non Chariable	Full Time Mgr Oct - Mar 2 Office Part 6 Groomers Part	$100,000	$100,000	Seattle to Puget Sound	15,000	$110 Season 3 Day $25 Day $10
Sault Ste. Marie/ Ontario	50	Non Profit Community Based City + 2 Local Orgs	Full Time Mgr 4 Support Staff Dec - Mar 28	Fixed Op $75,000 Variable $35,000	$110,000	Primarily Local 80% Day Passes from US/Michigan up to 7 hrs away	40,000+ 4,300 Passes of all kinds	$ 35 Day + $6 Sr/Student
Gatineau Park/ Quebec	180	Government Operated Annual Grooming Contract $160,000	1 Operations Mgr	N/A	N/A	Ottawa/Hull	75,000+	Self Regstr Honor System Season $55 Day $5

A similar trails concept to that proposed for the 100 Mile House area was also completed by Nordic Group for the community of Sault Ste. Marie. Here, a total of about 60 kilometres of multi-use, year round use trails centred on a large block of Conservation Authority land forms the core of their primarily, "urban" trail oriented network. Because the trails had been developed with input from various community groups and organizations (i.e. the Soo Finn XC Ski Club and the Kinsmen), it was suggested that a Trails Foundation be established as well to take responsibility for year round trail operations. As a result the City established an organization known as **Sault Trails & Recreation, Inc. (STAR)** which is NON Profit in structure but receives assistance from the city in form of staffing to help manage and operate the trails. This has created one full time position and several part time jobs during the winter season to help with ticket sales and grooming. Because of this structure, and the limited staff, the Sault organization does not get actively involved in other revenue generating enterprises associated with the trails (i.e. lessons, rentals, retail, etc.). The total budget for the operation is approximately $125,000 / year which includes a staffing grant of $30,000 from the City. Total revenues generated in the 1989/90 season provided a $5,500 net profit. Trail fees range from $6 - $8 / day and the area received over 40,000 skier visits in 1990/91.

Another area with many similarities to the 100 Mile House situation is the **Methow Ski Touring Foundation** based in Winthrop, Washington. This area provides approx. 150 kilometres of trails spread between three different trail systems centred around the western-theme town of Winthrop. As in the 100 Mile House area, the various trail systems are interconnected providing access and linkages to the various lodges and resorts in the region, the most notable being the 5 star Sun Mountain Lodge. This area also operates only during the winter, although there is a year round answering service which provides information on skiing in the Methow. The Foundation is structured as a NON PROFIT organization comprised of local skiers, business owners and families. The primary source of revenue is again from trailpasses which range in price from $10/day to $110 for the sesson. The area attracts around 25,000 skier visits per year. The MVSTA primary responsibility is for trail grooming and maintenance. As with the Jackson Touring Foundation, the various hotel operators and other local businesses combine to market the region and the individual properties. During the winter season they employ 4 -6 people including a few full time paid groomers. The Foundation is also responsible for developing trail maps and promotion material.

The MVSTA has been operating since 1979 when it was a very loose organization with several individual operators taking responsibility to start grooming some trails on a volunteer basis. They also indicate that the major impetus in getting the Methow Valley recognized as a trails destination, primarily for the Puget Sound market, was their initial efforts in marketing to which they allocated the most dollars. Today, the organization operates on a $100,000 budget and tries to breakeven on revenues generated primarily from the sale of trailpasses, which interestingly are among the highest in the country.

The organization feels it can operate adequately on its trail revenues to maintain and groom the trails, but it is seeking assistance from the State County to help fund the administrative component, especially since the MVSTA contributes almost 80 percent of the County's tourism revenues. If this occurs, the organization is interested in having its general manager operate on a YEAR ROUND BASIS as it is becoming evident in recent years that the trails are attracting more users for mountain biking and hiking as well. To this end, the organization recently changed its name to become the METHOW VALLEY SPORTS TRAIL ASSOCIATION.

Our assessment of these organizations illustrates that at present NO organization presently operates a YEAR ROUND trails program. In addition, one of the greatest weaknesses of most ski related organizations is their inability to market effectively...accept of course a long term group such as the Jackson Ski Touring Foundation. And finally, even successful organizations like the Jackson Foundation, have been unable to fully capitalize on a broad range of revenue generating opportunities, particularly from advertising, licensing and merchandising.

- **100 Mile House Organization**

It is our estimation that the proposed organization suggested for the 100 Mile House area become a more 'holistic', year round operation. The Non Profit status is helpful in dealing with landowner easements and government agencies and to receive certain funding considerations. But it is suggested that this organization take a more aggressive approach in generating revenues from sources other than trail fees.....unless of course, other alternatives are agreed upon to help finance the cost of staff and operations. As with other Foundations, marketing efforts should remain with the Ski Marketing Committee.

To direct the operations of the business office, including the hiring of a TRAILS COORDINATOR, a local Board from the community with both private and public sector interests could be set up. **Table 7.2** gives an overview of the functions and responsibilities to be undertaken by 100 Mile House Trails, INC.

Use of the trail system throughout the year will require regular maintenance and grooming to maintain the highest quality and standard for trails within the region (this may require further concessions from land owners and other interest groups). Trail Organization responsibilities include:

Coordination/facilitation for all trail-related facilities, programs and services. This includes; ticketing, reservations, group agendas, event scheduling and coordination (with an event organizer, if it is not the Trail Organization), grooming, ski school, trail maintenance, trail development, ski patrol, guide service, promotion and marketing, packaging arrangements, emergency action management, program development, etc.

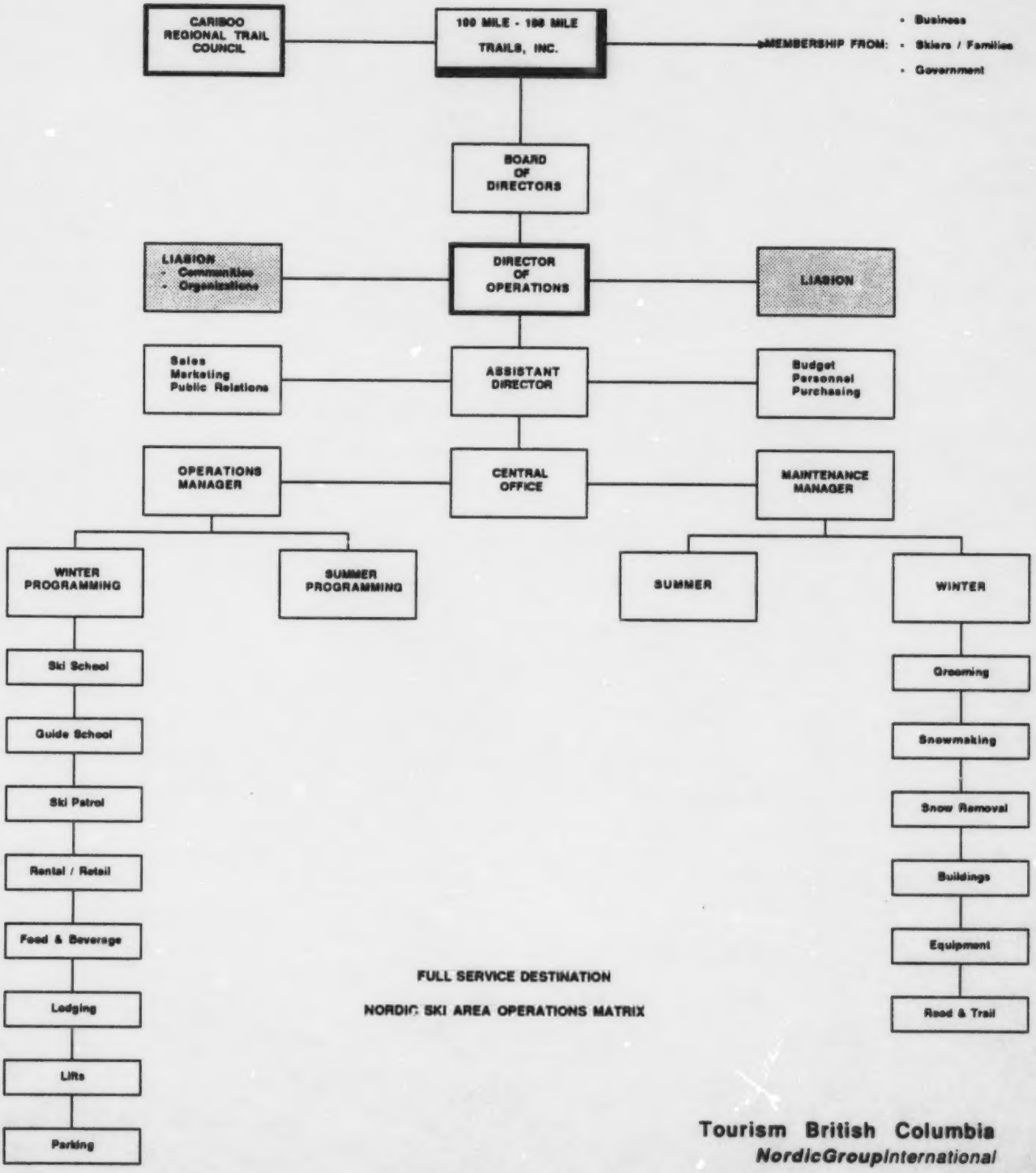
Coordination/facilitation of all cooperative trail programs, facilities, services organizations and promotional efforts (including development and administration of packages) within the 100 Mile - 108 Mile trail system. The Regional Trail Foundation would have responsibility to coordinate the development of additional trail linkages and destination facilities / opportunities within the region (i.e. Canim Lake / InterLakes Trail Groups).

The following provides additional details on the various responsibilities that the 100 Mile House Trails, INC should be cognizant of in order to ensure successful operations.

7.1.1 Personnel

A destination area's primary reputation is a product of quality personnel partnered with attractive natural resources and thoughtful design. Since employee commitment and philosophical involvement go hand-in-hand, early recruitment of department heads is recommended, thereby establishing their early involvement in trail construction, maintenance, administration and developing a primal level of pride and familiarity with the area's facilities and services.

TABLE 7.2
100 MILE HOUSE TRAILS ORGANIZATION



FULL SERVICE DESTINATION

NORDIC SKI AREA OPERATIONS MATRIX

Traditional mixes of fulltime and part-time labour can be augmented by significant volunteer services (eg. 99 Mile Nordics, ski patrol, etc.) that require constant nurturing for support, development (training) and coordination.

Job descriptions will favour individuals with diverse capabilities and professional, seasonal flexibility. In some instances, this could mean extended employment opportunity for seasonal workers. In most cases, it will demand in-house training and opportunities for professional certifications that will assure an adequate, multi-talented employment pool with energetic individuals, capable and willing to assume several functions.

Self-improvement opportunities should be planned and promoted as significant employee benefits. Job descriptions must clearly illustrate expectations for primary, alternate and incidental responsibilities.

In the resort/tourism industry, well-trained, personable (professional) staff is tantamount to success. Professional staff have pride and commitment that embellishes the recreational experience regardless of the quality of facilities and services. It is important for management to recognize that training and educational opportunities for employees is often valued as much as monetary compensation. It is equally important to recognize that skill and knowledge improvement deserves monetary compensation. Typically, pay scales are associated with certifications and job descriptions delineate timelines for required certifications. Quality output can only be expected from quality input.

This overview represents a business structure which might be achieved in 2 - 3 years of operation or earlier, depending on commitment and initial funding support for the trails concept. Initially, the coordination of a Trails Office for the 100 Mile House system might include only the following:

- a managing director, Chief of Trails
- two assistants
- operations foreman

7.2 Risk Management

The overall operations of the 100 Mile - 108 Mile Trails organization will have to recognize a significant risk management responsibility as the area becomes better known as a tourist destination and visitor use increases. The tenets of risk management suppose a degree of public and employee safety construed to be eminently reasonable. Mechanisms involve an array of checks and balances that fine-tune performance at every level of operation. Documentation is critical proof of sustaining risk management practices. Primary elements for an area's risk management program include:

- **human resources**: training program schedules, first aid and emergency training; communications systems; certifications; performance standards; development incentives; employee manuals.
- **management practices**: performance analysis reporting; preventive maintenance; inventory control; programs and staffing schedules; equipment inspections; repair systems; rules and regulations; visitor orientation programs; consumer information systems; etc.
- **equipment, vehicles, materials**: safety devices; use records; testing schedules; operations and maintenance procedures.
- **record keeping**: rental forms, instructor records; program records; time sheets; fuel management; trail maintenance logs; grooming logs; accident reports; snow condition reports; consumer surveys.
- **marketing**: realistic portrayal of areas, facilities and services; accurate information.

7.3 Programming

As the major visitor medium, this function will touch every element of the 100 Mile - 108 Mile operations and be a significant revenue generator. Each program area will require a semiautonomous operating system tailored to performance standards and objectives. Since all the trails and facilities are being planned for year round use, programming

decisions will have to reflect a full range of activities. Programming for the nordic component encompasses:

- **Ski School**: A core group of instructors will be needed including fulltime employees, augmented by part-time staff on evenings, weekends and holidays. A full range of nordic, alpine and telemark lessons should be offered. Some degree of CANSI certification should be a minimum hiring standard and "full" certification should be required for supervisory positions.

Advanced first aid and CPR certification is mandatory, with Guide or patroller training recommended for self-improvement. Examiner level certifications of key personnel would provide in-house capacity to sponsor regional instructor training programs which would further establish the area's credibility.

Promotion of ski instruction will be the responsibility of every employee. With a supporting promotional literature campaign, ski school lessons should be targeting an optimum 25% of all clientele. Instructors will also maintain daily record sheets and incident logs.

- **Guide School**:

Guide services should be promoted through ski lessons and normal resort channels (i.e. packaging), as personal hosts and hostesses that can provide interpretive commentary, trail skiing instruction, route planning and wilderness travel security (i.e. on extended trips to Holden Lake or into the alpine areas in the Cariboos). Guides will maintain trip records and incident logs. They should be considered a part of the "enforcement" arm of operations and could be developed as a division of the Ski School. Guides should be radio equipped. Advanced skiing, advanced first aid and emergency care, winter survival/ bivouac, search and rescue, physical excellence, public relations/communications skill, leadership, interpretation, etc. represent some of the skills that should be required.

Much of this training could be readily available through the ENDUCO SCHOOL operated locally.

- **Rentals**

Rentals (nordic, alpine, telemark) could be handled directly by the Trails Organization in partnership with a private sector operation. Again, a combination of fulltime and part-time employees will be required with ski instructors assisting when available. For operations with 200 to 400 rental units, one to two fulltime employees are generally required if other staff can assist as necessary. Another one to two part time staff should be planned for peak days.

- **Retail**

As the 100 Mile House trails become more recognized, retail merchandising opportunities promoting the facilities should be expanded. There could be a number of "core" products that are sold throughout the area with a portion of each sale going to the Trail Organization to help cover operating costs.

7.4 Operations

- **Ski Patrol:**

A core group of paid, professional patrollers are needed to provide basic levels of services along the various trail systems and staging areas. This group could be augmented by additional volunteer patrollers. These volunteers will be an effective development pool for future professional patrollers, guides and instructors.

As a rule, one patroller for every five kilometres of trail is considered optimum. We recommend that the nordic ski patrol be administered by a designated (and CSPS certified) Trails Organization employee. Certification of several key employees would clarify management's involvement and commitment to reliable patrol coverage/ response on a seven-day basis.

Patrol coverage will require sophisticated scheduling strategy with rotating sector assignment that provides optimum trail system coverage. A central dispatch centre (i.e. at the proposed Bridge Creek HQ facility) should monitor patroller and guide locations, and assume responsibility for all emergency management. All patrollers will be radio-equipped and trained for enforcement of area regulations.

- **Grooming**

Ideally, groomers should be skiers. With machinery that allows flexibility in track setting and skating lanes (in one pass), constant judgments must be made depending on terrain, exposure, snow conditions and temperature. Knowing how skiers and skis will perform/react completes the basis for the groomers decision making.

Groomer training should include the groomer's supervisor. Both need to be familiar with judgments required as to what apparatus is best for which conditions. At alpine ski areas, daily authorization is expected from the supervisor (based on snow and weather conditions) as to how, when and where to groom with what. Nighttime grooming minimizes opportunity for mistakes since temperature variation is unlikely.

- **Equipment**

The 100 Mile - 108 Mile House area will need to obtain at least one additional midsize snowcat with appropriate attachments as well as a couple of snowmobiles for backup. Generally areas are applying the value of having one snowcat for every 75 - 100 kilometres of trail. Equipment should come with interchangeable attachments, track widths no greater than 12 feet and minimum and maximum snow cleats. [Operators should be trained with considerable emphasis on nordic snowfarming techniques and track-setting policies.]
Grooming apparatus should be capable of four major functions:

- snowfarming: gathering and spreading snow (with plow) from trail sides to critical wear or burnout areas;
- compacting: compressing snow to develop a firm, resistant trail float (base); requires compactor bar, compactor roller or machine tracks;
- fluffing/grinding: loosening and granulating of compacted or frozen snow to create a powder like surface; requires a powder maker or power tiller;
- automated tracksetting: hydraulic or electric operated tracksetters that can be raised or lowered from the cab, for precision grooming requirements.

Backup grooming capability and winter maintenance and rescue access usually requires the availability of snowmobiles (for speed and minimal damage to groomed surfaces). For a trail network as proposed two snowmobiles should be available for basic operations. Snowmobiles are also important for early season packing of shallow snow falls (to promote ground freezing). High horsepower machines with low (non-factory) gear ratios are best for climbing and pulling capabilities.

All machines should be clearly marked with 100 Mile - 108 Mile Trail Organization logos so they won't be misidentified as nonofficial vehicles (trespassers). Machine use during skiing hours should be avoided whenever possible

- **Techniques**

Grooming strategies should be designed to maximize operating efficiency with routing that **reduces duplication** and with machinery and apparatus matched to the right job and snow conditions.

Grooming routes should be reversed as often as practical to maximize the snowfarming program. Under minimal snow conditions, the mid size vehicles and snowmobiles may be needed to prepack the "float", minimizing snowcover damage from the heavier, cleated tracks that will be used later.

Grooming schedule is primarily a temperature dependent operation that should be completed in non-skiing hours. One notable exception to this is in major snowstorms when machinery should be working constantly to "pack-channel" trails so that they can receive maximum depth of blow in snow.

- **Schedules**

Most of the trails and instruction areas should require daily grooming. Wilderness trails will be more "need specific" in terms of weekday grooming with daily grooming required on peak days. Work logs and patroller/guide reporting systems will monitor conditions along the trails and provide further direction for grooming requirements.

With few exceptions, trails should be groomed to accommodate both skating and traditional track skiing. Skiing trends are such that most people will utilize both techniques, to varying degrees. Even hardline traditionalists are finding that an occasional skating sprint adds welcome variety to their skiing rhythm. If any trails are to be designated for skating only, they must be accessed with a skating lane that originates at the respective trailhead/parking lot, since skaters cannot easily use tracks (no grip wax).

- **Alternative Grooming Functions**

Dependent on grooming schedules and amount of use, grooming vehicles can earn significant "other revenues" by pulling "sleigh trains" or ski buses.

7.4.1 Staging Areas

Operations functions for all staging areas must be controlled from the main proposed Trail HQ at Bridge Creek. This base should be equipped with necessary support services for reservations, scheduling, programming, maintenance, security & dispatching.

Provision of visitor services is a function of each staging area within the trail system, but as the "nerve centre" for operations, the Bridge Creek Staging Area should be the benchmark for all operating standards. It is here that the destination image will be developed through dissemination of information and services; and it is here, where coordination of all operational elements will make a diverse and multifaceted recreation/ski area highly understandable.

At all proposed staging areas and lodging facilities accurate representation of conditions and facilities is tantamount to successful market development. All operational elements will require centralized computer services with remote work centre terminals and public information and response stations (being optimum). Proposed guides, patrols and shuttle services will be the personalized "field arm" that cements the linkages between the satellite operations and the base area headquarters.

8.0 FEASIBILITY/ECONOMIC IMPACT ASSESSMENT

It has been a mainstay of ***NordicGroupInternational*** that a professionally planned, constructed and operated nordic ski area can be a successful revenue generator, and contribute to the overall YEAR ROUND tourism economy of a region or community.

Those in doubt of this position continue to base their impressions on ski areas or tourism operations that do not, in our estimation provide a "full menu" of skier (winter vacationer) opportunities, nor have capitalized on expanding NON WINTER activities using the existing trail infrastructure to create a YEAR ROUND TRAILS IDENTITY.

Our review of other trail systems and organizations suggest that apart from a few areas in Quebec (Mte. Ste. Anne) and Ontario (Hardwood Hills, Stokely Creek) there is no competitive DESTINATION NORDIC SKI centre being promoted in the west which would have the trail base and facilities to be developed in the 100 Mile - 108 Mile House area. If the existing cross country ski product continues without significant improvements, it may sustain current local / regional markets but will not exhibit the growth and revenue potential obtainable from destination markets.

However, the vision anticipated for the 100 Mile - 108 Mile area is based on a product that will offer a full range of ski trail and winter activity opportunities as well as providing a strong YEAR ROUND trails activity identity.

NordicGroupInternational's annual survey of cross country ski areas operations clearly identifies an upward trend in skier visits and expenditures (with resulting net revenues) as operators become more sophisticated in developing, promoting and operating their ski areas. An example illustrating the relative success cross country skiing can bring to a community can be found in Jackson, NH, a town with a population of only 800 people and home of the Jackson Ski Touring Foundation which attracted over 60,000 skier visits in 1990/91. These skiers generated over $4 million (U.S.) for the town, with an additional $1 million in surrounding communities (personal communication). Nordic skiing directly employs 34 people in the community. We believe that if 100 Mile House expands on this level of operation and establishes a YEAR ROUND DESTINATION TRAILS IDENTITY it should prove eminently viable while creating a unique tourism attraction within British Columbia.

8.1 Revenue / Expense Projections

Having defined an organizational structure which could be established for the 100 Mile - 108 Mile House trail system and identifying the range of responsibilities and duties that would be expected at a destination trails oriented operation, it is possible to determine an operating budget and a projected pro-forma assessment regarding the overall results of the plan if successfully implemented .As indicated in our Organizational Review, the 100 Mile - 108 Mile Trails Organization could be operated under different scenarios from;

- WINTER, trail only operations(i.e. groom and maintain like Jackson, NH)
- WINTER, but expanded operations including retail, food & beverage sales,
- YEAR ROUND trail operations with stronger emphasis on generating revenues from merchandising, marketing, licensing , etc.

In addition, our financial assessments include various other assumptions such as the Trails Organization obtaining their own Headquarter Facility, as recommended in the Plan, by at least year 3 of operations. We have also assumed very conservative figures for such items as; SEASON PASSES or BUSINESS MEMBERSHIPS. One can quickly see the change in the bottomline if season passes increased in price from $45 / family to $55 or $65/family (which is much more reasonable). Options are provided as well, for setting up a system of SEASON PASSES based on ; a) winter use only or b) a YEAR ROUND Trail Pass which gives the holder a little more status and benefits perhaps partnered with a 10 - 20 % reduction in a package price stay at one of the resorts or hotels.

Some of these ideas have never been implemented at other trail areas and as indicated **no area** to our understanding promotes itself as a YEAR ROUND TRAIL DESTINATION. If some of these ideas are adopted by the 100 Mile House area, it could position itself as Canada's first true, trail destination resort area.

In examining the various financial statements, one can see how the Trails Organization could operate from a small operating loss in the first year in **Scenario 1** (Table 8.1), to generating a profit of $54 - $88,000 as indicated in **Scenario 3 & 4.** (Table 8.3 & 8.4) These scenarios are all based on relatively conservative START UP assumptions including having only a small staff , modest marketing budget, etc.

TABLE 8.1

SCENARIO - 1 - BASIC OPERATION - WINTER ONLY

100 MILE AND 108 MILE HOUSE
DESTINATION CROSS COUNTRY SKI AREA MASTERPLAN
PROJECTIONS OF TRAIL RELATED REVENUE AND EXPENSE
START UP- through to 1993/94
($000's)
(STANDARD SCENARIO)

CATEGORY		START UP	1991/92	1992/93	1993/94
REVENUE:					
Grants -	Federal	10.00	10.00	10.00	10.00
	Provincial	25.00	25.00	25.00	25.00
Trail fees -	Family	23.00	24.73	25.96	27.26
	Day use	43.20	58.50	64.30	71.50
	Snomobile	7.70	8.00	9.00	9.70
Business memberships		4.00	5.00	6.00	7.00
Events		16.00	20.00	24.00	28.00
Merchandising		20.00	25.00	30.00	32.50
Licensing		7.50	10.00	12.50	15.00
Education		7.50	10.00	12.50	15.00
Advertising		15.00	17.50	20.00	22.50
Total revenue		178.90	211.73	239.26	263.46
EXPENSES:					
Wages and benefits		75.00	75.00	105.00	105.00
Office lease		15.00	15.00	5.00	5.00
Office equipment lease		5.00	6.00	7.00	7.00
Communications and supplies		5.00	6.00	7.00	8.00
Travel		8.00	9.00	10.00	11.00
Marketing and promotion		20.00	25.00	30.00	30.00
Events and programmes		4.00	5.00	6.00	7.00
Board/committee expenses		3.00	3.00	3.00	3.00
Legal, Accounting		2.00	2.50	3.00	3.50
Operations' maintenance:					
Payroll		45.00	45.00	45.00	50.00
Snow Removal		2.50	2.59	2.68	2.77
Trails' maintenance		5.00	5.18	5.36	5.54
Equipment maintenance		7.50	7.76	8.03	8.32
Other		10.00	10.35	10.71	11.09
Total expenses		207.00	217.38	247.78	257.22
INCOME		**-28.10**	**-5.65**	**-8.52**	**6.24**

Assumptions for Scenario 1, Standard

Revenues:

1. Grants estimated for marketing, research and development, and training as well as for tourism planning and development for capital expenditures for proposed infrastructure;
2. Trail Fees - **Family** memberships estimated at 500 @ $45.00 per year during the start up period as a conservative fee cost basis.
3. Trail Fees - **Day Cost** based on 60% of existing market for overnight, plus 30% of future demand all at $6.00 per use.
4. Organization membership - automatic membership for those on family passes; others at $100 per year with 40 estimated in the start up year being conservative;
5. Events estimated at $4,000 each;
6. Merchandising of related products including Guide books and trail maps estimated at $1.50 per item on average;
7. Licensing revenues based on targeted businesses to provide a full range of Cariboo Trail Brand products and services estimated to be 15 @ $500 in the start up year and this excludes commissions on licensee sales;
8. Education revenues are based on training seminars and workshops convened on a range of topics including: trail construction, trail maintenance, snow patrol, safety and mechanical awareness, wilderness survival and others. Courses to be held throughout the year;
9. Advertising revenues are based on the sale of inserts in publications, brochures, videos, merchandising materials, maps, events, signage and training courses.

Expenses:

1. Wages and benefits include an executive director and one assistant for the initial period which could increase by one assistant by the third year.
2. Office equipment lease based on 3-5 years depending on equipment. This includes computers, printers, software, consulting, phone system, fax, and copier;
3. Communications and supplies includes long distance, courier, office stationary, postage and the like;
4. Office leased based on the organization needing to rent space in the first two years and moving into its own building in the latter two years of the projections;
5. Travel costs are based on 32 days in year 1 @ $250.00 per day inclusive;
6. Marketing and Promotion derived from: video production, brochure design and production, trade shows, portable presentation booth, handouts and giveaways;
7. Events and programs cost an estimated $1000 per event;
8. Operations and Maintenance payroll costs based on 1.5 full time equivalent employees in the initial years.

TABLE 8.2

SCENARIO - 2 - WINTER OPERATION WITH FOOD CONCESSION

PROJECTIONS OF TRAIL RELATED REVENUE AND EXPENSE
START UP-1993/94
($000's)
(STANDARD SCENARIO WITH TRAILHEAD FOOD CONCESSION)

CATEGORY	START UP	1991/92	1992/93	1993/94
REVENUE:				
Grants - Federal	10.00	10.00	10.00	10.00
Provincial	25.00	25.00	25.00	25.00
Trail fees - Family	23.00	24.73	25.96	27.26
Day use	43.20	56.50	64.30	71.50
Snomobile	7.70	8.00	9.00	9.70
Business memberships	4.00	5.00	6.00	7.00
Events	16.00	20.00	24.00	28.00
Merchandising	20.00	25.00	30.00	32.50
Licensing	7.50	10.00	12.50	15.00
Education	7.50	10.00	12.50	15.00
Advertising	15.00	17.50	20.00	22.50
Trailhead food concession	107.50	117.00	157.50	188.00
Total revenue	286.40	328.73	396.76	451.46
EXPENSES:				
Wages and benefits	75.00	75.00	105.00	105.00
Trailhead food concession -				
Cost of sales	43.00	45.00	60.00	70.00
Payroll	25.00	27.50	35.00	40.00
Supplies...	5.50	6.00	7.50	9.25
Office lease	15.00	15.00	5.00	5.00
Office equipment lease	5.00	6.00	7.00	7.00
Communications and supplies	5.00	6.00	7.00	8.00
Travel	8.00	9.00	10.00	11.00
Marketing and promotion	20.00	25.00	30.00	30.00
Events and programmes	4.00	5.00	6.00	7.00
Board/committee expenses	3.00	3.00	3.00	3.00
Legal, Accounting	2.00	2.50	3.00	3.50
Repairs and Maintenance:				
Payroll	45.00	45.00	45.00	50.00
Snow Removal	2.50	2.59	2.68	2.77
Trails' maintenance	5.00	5.18	5.36	5.54
Equipment maintenance	7.50	7.76	8.03	8.32
Other	10.00	10.35	10.71	11.09
Total expenses	280.50	295.88	350.28	376.47
INCOME	**5.90**	**32.85**	**46.48**	**74.99**

Assumptions - Standard with Trailhead food concession

It is likely that the economics of the trail system will require the Organisation to establish on a seasonal basis. Properly set up, the same employee could productivley look after trail sales, trail user information and the sale of fast food items. Our estimates are based on W with direct operating costs relevant for this type of business.

TABLE 8.3

SCENARIO - 3 YEAR ROUND OPERATION (SKIING /EQUESTRIAN)

PROJECTIONS OF TRAIL RELATED REVENUE AND EXPENSE
START UP-1993/94
($000's)
(STANDARD SCENARIO WITH HORSE TRAIL REVENUE)

CATEGORY		START UP	1991/92	1992/93	1993/94
REVENUE:					
Grants - Federal		10.00	10.00	10.00	10.00
Provincial		25.00	25.00	25.00	25.00
Trail fees -	Family	23.00	24.73	25.96	27.26
	Day use	43.20	56.50	64.30	71.50
	Snomobile	7.70	8.00	9.00	9.70
	Horse use	82.50	87.50	93.20	99.70
Business memberships		4.00	5.00	6.00	7.00
Events		16.00	20.00	24.00	28.00
Merchandising		20.00	25.00	30.00	32.50
Licensing		7.50	10.00	12.50	15.00
Education		7.50	10.00	12.50	15.00
Advertising		15.00	17.50	20.00	22.50
Total revenue		261.40	299.23	332.46	363.16
EXPENSES:					
Wages and benefits		75.00	75.00	105.00	105.00
Office lease		15.00	15.00	5.00	5.00
Office equipment lease		5.00	6.00	7.00	7.00
Communications and supplies		5.00	6.00	7.00	8.00
Travel		8.00	9.00	10.00	11.00
Marketing and promotion		20.00	25.00	30.00	30.00
Events and programmes		4.00	5.00	6.00	7.00
Board/committee expenses		3.00	3.00	3.00	3.00
Legal, Accounting		2.00	2.50	3.00	3.50
Repairs and Maintenance:					
Payroll		45.00	45.00	45.00	50.00
Snow Removal		2.50	2.59	2.68	2.77
Trails' maintenance		5.00	5.18	5.36	5.54
Equipment maintenance		7.50	7.76	8.03	8.32
Other		10.00	10.35	10.71	11.09
Total expenses		207.00	217.38	247.78	257.22
INCOME		54.40	81.85	84.68	105.94

Assumptions - Standard Operations with Horse Trail Revenues

Under this Scenario, a fee of $3.00 per rider would be assessed against businesses and organizations of a "horse use" package, for the use of the Trail Organization's trail system. Estimates are based on overnight equestrian oriented visitors only, for an average stay of 3.93 nights.

TABLE 8.4

SCENARIO - 4 - YEAR ROUND WITH FOOD CONCESSION

PROJECTIONS OF TRAIL RELATED REVENUE AND EXPENSE
START UP-1993/94
($000's)
(STANDARD SCENARIO WITH BOTH TRAILHEAD FOOD AND HORSES)

CATEGORY	START UP	1991/92	1992/93	1993/94
REVENUE:				
Grants - Federal	10.00	10.00	10.00	10.00
Provincial	25.00	25.00	25.00	25.00
Trail fees - Family	23.00	24.73	25.96	27.26
Day use	43.20	56.50	64.30	71.50
Snomobile	7.70	8.00	9.00	9.70
Horses	82.50	87.50	93.20	99.70
Business memberships	4.00	5.00	6.00	7.00
Events	16.00	20.00	24.00	28.00
Merchandising	20.00	25.00	30.00	32.50
Licensing	7.50	10.00	12.50	15.00
Education	7.50	10.00	12.50	15.00
Advertising	15.00	17.50	20.00	22.50
Trailhead food concession	107.50	117.00	157.50	188.00
Total revenue	368.90	416.23	489.96	551.16
EXPENSES:				
Wages and benefits	75.00	75.00	105.00	105.00
Trailhead food concession -				
Cost of sales	43.00	45.00	60.00	70.00
Payroll	25.00	27.50	35.00	40.00
Supplies...	5.50	6.00	7.50	9.25
Office lease	15.00	15.00	5.00	5.00
Office equipment lease	5.00	6.00	7.00	7.00
Communications and supplies	5.00	6.00	7.00	8.00
Travel	8.00	9.00	10.00	11.00
Marketing and promotion	20.00	25.00	30.00	30.00
Events and programmes	4.00	5.00	6.00	7.00
Board/committee expenses	3.00	3.00	3.00	3.00
Legal, Accounting	2.00	2.50	3.00	3.50
Repairs and Maintenance:				
Payroll	45.00	45.00	45.00	50.00
Snow Removal	2.50	2.59	2.68	2.77
Trails' maintenance	5.00	5.18	5.36	5.54
Equipment maintenance	7.50	7.76	8.03	8.32
Other	10.00	10.35	10.71	11.09
Total expenses	280.50	295.88	350.28	376.47
Income.	88.40	120.35	139.68	174.69

Scenario #5 (Table 8.5), titled Consolidated Revenue & Expense Projections, takes a different business approach which separates the actual revenues/expenses produced by the trail operations and rolls them into the actual management/administration costs of running the Trails Organization on a year round basis. In this scenario, we assume a much more aggressive START UP in terms of staffing and marketing. The Scenario indicates that revenues would come into the Organization from membership fees, grants and advertising. In addition, revenues would be generated from individual trail fees collected from both winter and non-winter trail use fees which include; instruction, rentals, retail, etc. After deducting costs for operating the office as well as providing year round trail maintenance and winter grooming upkeep, this Scenario suggest a net income before taxes and debt servicing of $25, 230.

The Consolidated Statement reflects the alternative projections of Winter and Non Winter revenues and expenses as shown on the accompanying schedules, based on assumptions noted. In general, other revenue and expenses somewhat reflect income and expenditure levels from previous scenarios, but are presented for illustrative purposes only. No attempt should be made to reconcile figures presented under the consolidated statement scenarios with those previously discussed.

- 1 Member trail fee contribution permits the assessment of a fee against all organizations and businesses with members or clients using the trails. Trail organization member organizations would be required to pay this as a supplement to their membership fees particularly when membership fees are at nominal levels as currently estimated;
- 2 Similarly, a marketing assessment would permit the Trails' organization to assess organizations with user clients or members to recover a portion of the overall marketing budget expenditures through which all of the 100 Mile House based businesses benefit directly or indirectly from the effective marketing of the trails' system by the Trail's organization;
- 3 Year round memberships could be targeted to those groups whose business would potentially benefit from the year round operation of the trails system;
- 4 Non Winter contribution reflects income before overhead as shown on the accompanying schedule, based on stated assumptions; and
- 5 Winter contribution reflects income before overhead as shown on the accompanying schedule, based on stated assumptions.

The conclusion reached in examining these financials clearly indicates that the more aggressive and YEAR ROUND the scale of operations become the better the results will be in making the Trails Organization a more viable proposition.

TABLE 8.5
CONSOLIDATED REVENUES & EXPENSES
YEAR ROUND TRAIL OPERATION

CONSOLIDATED REVENUE AND EXPENSE PROJECTIONS
1991/92 - 1993/94
($000's)

CATEGORY	1991/92	1992/93	1993/94
REVENUES:			
Memberships - full	24.73	25.96	27.26
affiliated	5.00	6.00	7.00
year round	0.00	0.00	0.00
Member trail fee contribution	0.00	0.00	0.00
Donations	5.00	7.50	7.50
Grants	35.00	35.00	35.00
Marketing assessment	0.00	0.00	0.00
Licensing/Advertising	27.50	32.50	37.50
Total revenue	97.23	106.96	114.26
EXPENSES:			
Administration:			
Salaries and benefits	115.00	119.03	124.98
Telephone/fax	6.00	7.50	10.00
Photocopier, computer...	7.00	7.25	8.00
Office supplies	5.00	6.00	7.00
Audit, accounting, legal	5.00	6.00	7.00
Travel	8.00	8.50	10.00
Insurance	5.00	5.00	5.00
Printing/postage	2.00	3.00	4.00
Licenses	1.00	1.25	1.50
Office rental	15.00	15.00	15.00
Miscellaneous	10.00	11.00	12.00
Total	**179.00**	**189.52**	**204.48**
Marketing:			
Memberships	2.50	5.00	7.50
Advertising	10.00	12.50	12.50
Travel, entertainment	12.50	15.00	17.50
Trade Shows	10.00	10.00	10.00
Supplies	2.50	3.50	5.00
Subscriptions	1.00	1.25	1.50
Signage	2.50	3.50	5.00
Printing/postage	5.00	6.00	7.50
Direct Mail	10.00	12.50	15.00
Commissions	5.00	7.50	10.00
Miscellaneous	10.00	12.50	15.00
Total	**71.00**	**89.25**	**106.50**

Utilities	5.00	6.00	7.50
Operations/maintenance:			
Payroll	50.00	51.75	54.34
Snow removal	2.50	3.50	5.00
Rentals' maintenance	2.50	4.00	6.00
Equipment maintenance	7.50	10.00	10.00
Trail maintenance	17.50	20.00	25.00
Equipment rental	5.00	7.50	10.00
Other	10.00	12.50	15.00
Total	95.00	109.25	125.34
Total expenses	350.00	394.02	443.81
Income before trails' contribution	-252.77	-287.06	-329.55
REVENUE FROM TRAIL FEES			
Winter	23.80	51.20	80.60
Non Winter	254.20	413.30	604.50
Income before debt servicing	**25.23**	**177.44**	**355.55**

Assumptions - Consolidated statement

WINTER TRAIL RELATED REVENUES AND EXPENSES

1. Demand reflects day, overnight and varying lengths of stay between X-C and snowmobile categories;

2. Trail fees based on $3.00 per user in year 1, rising to $4.50 and $6.00 in years 2 and 3 respectively;

3. Instruction based on 5% of trail fees;

4. Rentals based on 10% of trail fees;

5. Food and beverage based on $2.00 per person in year 1, increasing by 7.5% and 5% in years 2 and 3 respectively;

6. Retail, special events and miscellaneous revenues are similar to those presented in other scenarios included in this section of the plan;

7. Inflation has been assumed at 3.5% per year unles otherwise noted;

8. Payroll has been based on 2 persons per 8 hour day, 7 days per week for 105 days, at $7.50 per houre plus some benefits;

9. Cost of sales for food and beverage has been estimated at 25%;

10. Cost of sales for retail and special events has been calculated at 75% of projected revenues;

11. "Other" expenses based on 5% of total revenues;

NON WINTER TRAIL RELATED REVENUES AND EXPENSES

1. Demand reflects excursion and overnight stays, the latter at 3.93 nights per person;

2. Trail fees based on $2.00 per user in year 1, rising to $3.00 and $4.00 in years 2 and 3 respectively;

3. Instruction based on 2.5% of trail fees;

4. Rentals based on 2.5% of trail fees;

5. Food and beverage based on $2.00 per person in year 1, increasing by 7.5% and 5% in years 2 and 3 respectively, with penetration of 50%, 55% and 60% in years 1 through 3 respectively;

6. Retail and miscellaneous revenues have been arbitrarily established;

7. Special events assume two per year, at $5,000.00 per event in year 1;

7. Inflation has been assumed at 3.5% per year unles otherwise noted;

8. Payroll has been based on 1.5 persons per 8 hour day, 7 days per week for 121 days at $7.50 per hoour, plus 3 per day for 62 days, together with some benefits;

9. Cost of sales for food and beverage has been estimated at 25%;

10. Cost of sales for retail and special events has been calculated at 75% of projected revenues;

11. "Other" expenses based on 5% of total revenues;

100 MILE TO 108 MILE HOUSE
DESTINATION CROSS COUNTRY SKI AREA MASTERPLAN
PROJECTIONS OF WINTER TRAIL RELATED REVENUE AND EXPENSE
1991/92 - 1993/94
($'s)

CATEGORY		1991/92	1992/93	1993/94
VISITS -	**X-C**	**5480.0**	**7640.0**	**9250.0**
	Snowmobile	**1332.0**	**1398.0**	**1468.0**
REVENUES:		**$**	**$**	**$**
Trail fees		20436.0	40671.0	64308.0
Instruction		1021.8	2033.6	3215.4
Equipment rentals		2043.6	4067.1	6430.8
Food and Beverage		13624.0	19431.7	22507.8
Retail		15000.0	16125.0	16931.3
Special events		16000.0	16560.0	17139.6
Miscellaneous		3000.0	5000.0	7000.0
Total Revenue		71125.4	103888.4	137532.9
EXPENSES:				
D.O.E. -	Payroll	15000.0	15525.0	16068.4
	C.O.S. - F & B	5449.6	7481.2	8440.4
	retail	23250.0	24513.8	25553.1
	other expenses	3556.3	5194.4	6876.6
Total D.O.E.		47255.9	52714.4	56938.6
INCOME CONTRIBUTION TO OVERHEAD		**23869.5**	**51174.0**	**80594.3**

100 MILE TO 108 MILE HOUSE
DESTINATION CROSS COUNTRY SKI AREA MASTERPLAN
PROJECTIONS OF NON WINTER TRAIL RELATED REVENUE AND EXPENSE
1991/92 - 1993/94
($'s)

CATEGORY		1991/92	1992/93	1993/94
VISITS - All activities		104109.0	116502.0	131274.0
REVENUES:		$	$	$
Trail fees		208218.0	349506.0	525096.0
Instruction		5205.5	8737.7	13127.4
Equipment rentals		5205.5	8737.7	13127.4
Food and Beverage		117000.0	157500.0	188000.0
Retail		15000.0	16125.0	16931.3
Special events		10000.0	10350.0	10712.3
Miscellaneous		3000.0	5000.0	7000.0
Total Revenue		363628.9	555956.3	773994.3
EXPENSES:				
D.O.E. -	Payroll	27500.0	35000.0	40000.0
	C.O.S. - F & B	45000.0	60000.0	70000.0
	retail	18750.0	19856.3	20732.6
	other expenses	18181.4	27797.8	38699.7
Total D.O.E.		109431.4	142654.1	169432.3
INCOME CONTRIBUTION TO OVERHEAD		254197.5	413302.2	604562.0

8.2 Economic Impact Assessment

The proposed Trails Organization and operations in the 100 Mile - 108 Mile area should create significant income and employment benefits within the immediate local area. Table 8.6 summarizes our projections regarding the economic impact.

The total tourism related income effect associated with developing and operating a major YEAR ROUND Trails Destination attraction will take the form of **direct and indirect benefits** as defined below.

- **Direct Effects** - is comprised of profits, wages and salaries which accrue to the Trails Organization as a result of visitor expenditures. In addition, direct income will be derived from other tourism related business within the community as a result of visitor expenditures.

- **Indirect Effects** - comprised of secondary benefits associated with successive rounds of expenditures by the Trail Organization's suppliers (indirect impacts) and by local residents who benefit from the tourism expenditures (induced impact).

In order to arrive at an estimate of the total income effect of the trails operations, an income multiplier utilized by the Ministry of Tourism has been applied.

As indicated in the Table, we have estimated that the potential economic impact of trails on the economy of the 100 Mile - 108 Mile area could be in the order of **$4.74 million in 1991/92 rising to $9.3 million by 1993/94.**

Table 8.6

Summary of Economic Impact for Year Round Trails Activities 1991-1994

Economic Impact and Potential Revenue in ($,000's)

CATEGORY	1991/92		1992/93		1993/94	
WINTER:	**DAY**	**O'NIGHT**	**DAY**	**O'NIGHT**	**DAY**	**O'NIGHT**
Cross Country -						
Demand	3836	1644	5348	2292	6475	2775
pp expenditures	23.37	75	25.12	77.63	26	80.35
Potential revenue	90	205	134	295	168	370
Economic Impact	143	327	215	473	269	592
Snowmobile -						
Demand	666	666	699	699	734	734
pp expenditures	23.15	67.99	23.96	70.37	23.96	72.83
Potential revenue	15	151	17	164	18	179
Economic Impact	25	242	27	263	28	286
Total - Winter Economic Impact	168	569	242	735	297	878
NON WINTER:	EXCURSION		EXCURSION		EXCURSION	
Demand	2378	7660	3188	10259	4780	15360
pp expenditures	50.86	45.9	53.14	47.99	55.37	50.08
Potential revenue	121	352	169	492	265	769
Economic Impact	194	563	271	788	423	1231
Total - Non Winter Economic Impact	194	563	271	788	423	1231
Total Economic Impact	362	1132	513	1523	721	2109

100 Mile and 108 Mile House
Destination ski area master plan
Assumptions - Year round trails economic impact

1. Assumes economic multiplier of 1.6;

2. Overnight cross country stays extimated at 66% for two nights: 34% for one night;

3. Cross country pp expenditures assume inflation of 3.5% annually in second and third years;

4. Overnight snowmobile revenue reflects average pp expenditures of $62.00 for U.S. and $75.00 for Canadians;

5. Overnight snowmobile revenues assume weighted average length of stay of 3.34 days;

6. Snowmobile pp expenditures inflated at 3.5% throughout;

7. Non winter revenues assume weighted average length of stay of 3.93 days;

8. Non winter revenues assume weighted average pp expenditues of $45.90 for overnight and $50.86 for excursionists in 1992: inflated at 3.5% annually thereafter;

9. "Years" for non winter demand refer to calendar 1992, 1993 and 1994;

10. Non winter demand reflects a 50% share of Trail System non winter demand, annually;

9.0 MARKETING PLAN

The 100 Mile - 108 Mile House area already has in place a number of marketing tools that promote its nordic image, including a Cariboo Cross Country Brochure and various trail maps. The plan put forth in this report introduces an ambitious program upon which the area can further expand its marketing image. The improved trail infrastructure will give the area a stronger identity, not only for nordic skiing but also for a wider range of year round trail based activities.

The development of a new primary staging area and Trail Headquarters facility will add a new dimension to an array of existing tourism products and attractions already contributing to the both the winter and non-winter vacation experience in the Cariboo.

Marketing the community as a winter vacation destination will involve translating existing resources into a range of tourism / recreation opportunities of perceived value to potential visitors. In order to be effective, the marketing of the trails infrastructure and proposed Trail Headquarters facility will have to reflect a style suited to its own goals and those of the area as a whole. In terms of marketing strategy, the Trails Organization might adopt a "societal marketing approach" which focuses on the satisfaction of tourist needs, while respecting the community's long term interests.

With the history of community/club involvement in cross country skiing in the 100 Mile - 108 Mile area and the local market being projected as a major supporter of the trail system (in terms of adopting a community trails attitude), this approach would seem appropriate. The marketing plan reflects certain goals and objectives and marketing/product themes as well as actions that need to be taken in attracting the various (trail use) markets to the 100 Mile - 108 Mile House area.

9.1 Goals and Objectives

The emphasis of this project has been the development of a destination year round trail system tourism attraction in addition to expanding the area's nordic ski appeal. The implementation of this plan will have significant impact on the overall winter tourism prospects for the community and the major resort operators. In this respect, a number of goals and objectives are recommended for consideration that will give further direction to the Marketing Plan.

100 Mile - 108 Mile Marketing Goal:

To develop and promote a wide range of recreation/tourism opportunities that further enhance the area's identity as a tourist destination and stimulates increased economic benefits by attracting greater numbers of winter vacation visitors.

As one component within the mix of the overall recreation/tourism opportunities, the primary goal in marketing the trails and Trail Headquarters is recommended to be:

To develop and promote a high quality trails product and trail facility that will provide a wide range of user experiences (particularly for nordic skiing and winter recreation) that will attract and retain target segments in the primary, secondary and destination markets.

Specific objectives to be achieved should include:

1. Increase the number of season pass holders and overall day use skier visits by 15% (as a minimum) each year.

2. Increase destination skier visits by a minimum of 20% each year that will contribute to increased economic benefits for the area (i.e. show an increase in room bookings).

3. Increase the number of programs and services offered through the proposed Trails Organization in cooperation with local suppliers and increase participation in them (i.e. rentals, ski lessons).

4. Encourage increased public/private sector involvement in the development, operation and marketing of the nordic ski product.

5. Ensure the coordination of the 100 Mile - 108 Mile Marketing Plan with the plans, programs and activities of other tourism related business interests in the area including: Chamber of Commerce, BC Rail, and the overall Regional Marketing of the Cariboo as a whole.

6. Expand upon and develop consistent promotional themes and messages in marketing the nordic ski product.

9.2 Theme/Message

In order to develop an effective marketing plan, an overall theme should be finalized that clearly identifies and establishes an "image" of the area's trail product and nordic ski / winter recreation opportunities..

The themes, and resulting messages, are important in implementing the various marketing activities. If themes and messages are uniformly addressed, no matter what type of marketing activity undertaken, increased consumer awareness can be achieved.

It is clear that the primary theme for the area should reflect its "gold rush" history and wherever possible tie into the regional marketing themes presently being used to promote the Cariboo.

For Non winter trail activities, the theme could be focussed more on the "wild west" and "cowboy" images already in place as that seems more appropriate for such activities as, horse back riding, mountain biking, etc..

Themes for the winter market, which is becoming more sophisticated should focus more on the trail experiences, the scenery and "open spaces" as well as the hospitality and services which should become a hallmark of the area.

Overall themes for the area could consider such slogans as; "Canada's Destination Trails End", or "Canada's Nordic Nugget".

Promotable attractions within this theme, moving from the general to the specific, include:

- Canada, Super Natural BC (for Americans, a foreign country)
- the region (history, geology, cultural values,)
- the seasons (recreation, entertainment, events, etc.)

- recreation (winter - nordic and alpine skiing, snowmobiling, ice fishing, snowshoeing./ summer- trail riding, mountain biking, hiking, etc.)
- nordic skiing (diverse sites, facilities, programs)
- the Trail Headquarters

This approach permits both a wide variety of experiences for visitors and numerous "story lines" for the media to cover. It will also provide a natural lead in for promoting visitation in all seasons while increasing the winter identity and exposure.

For the Trail Headquarters, the theme could suggest "Canada's Crossroads for Cross Country Skiing" or "Discover Canada's Trail Destination".

A number of messages should be developed that build on the themes. The "messages" would relate specific information to different targeted markets, be they local or destination, active skiers or non skiers, etc.

9.3 Marketing Steps

The following provides an overview of the specific tasks or functions that need to be considered in implementing an expanded marketing strategy for the 100 Mile - 108 Mile House area. The format which is followed is intended to complement the strategy developed for the Regional Trails Program as identified in the TRAILBLAZER study. Wherever possible, if the area is going to increase its profile and recognition as a destination cross country ski area it will have to build on the messages and themes as well as the techniques being used to market the overall Cariboo Region.

Short Term Plan (1-2 years)

The following are actions that should be implemented immediately:

Product

If TOTAL funding can be secured, it is recognized that there will be immediate benefits by implementing ALL the product improvements identified in the Plan as quickly as possible to create a strong trails identity that can effectively compete with other areas undergoing current trail development improvements such as; Silver Star Resort and Wells Gray Park. Otherwise, development will have to proceed in phases as identified below.

- general upgrade of existing trails (as outlined in the Plan)
- begin construction of new "showpiece trails" (i.e.: the Nature Interpretive Boardwalk, the Bridge Creek Trail)
- begin construction of the PRIMARY trail staging facility at Bridge Creek Ranch
- expand lighted trail loop between the 108 and the Hills resorts.
- develop an expanded menu of trail related programs activities, events on a year round basis (i.e. summer mountain bike marathons, Triathalons based on Cariboo activities such as; riding, biking, hiking, / x-c skiing, telemarking, dog sledding)

Place

- Develop the trademark "gateway" entrances at the major trailhead staging areas including, 100 Mile House, and the 108 Heritage site that welcome visitors for a "trail experience"
- Develop a coordinated signage program providing a strong visual image from trailhead to trail name signs.

Price

- Develop a long range "trail use" pricing strategy which is palatable to all (i.e.: seasonal trail pass system, program surcharge, product surcharge).

Promotion

- Promote membership in the 100 Mile - 108 Mile Trails, INC.
- Develop brochures for local and regional consumption to increase awareness of improved trail product.
    - stress diversity of trail opportunities ("something for everyone")
    - target family markets, special user groups (BC Outdoor Recreation Council, snowmobile clubs, equestrian clubs).
- use "consortium marketing" for trail related brochures (i.e. as currently done between the 108, the Hills and the Red Coach - but try to expand upon this core group)
- Local promotional material -- restaurant and activity guides should be amended to include a significant component directed to trails, services and augmented products.

- Distribute brochures to:
    - regional sports stores
    - local/regional clubs
    - to destination enquiries seeking tourist information on area
    - at the tourist booth
- Develop local/regional family market "packages" that include:
    - hotel ; shuttlebus to trails; lessons, instructions special dinner;

Medium-Term Plan (2-5 Years)

During the medium term, significant increases in regional visitation from areas like Greater Vancouver,is targeted -- destination travel (from Alberta, Washington) will begin to increase, although it will not be significant (except for those operators already marketing to this group)

Product

- Most existing trails should be upgraded, uniformly signed, staging areas and facilities developed
- Expanded facilities for groups, conferences and older visitors should be considered. Facilities that can cater to bus traffic/tours will improve the area's renown and economic resiliency. A partnership incorporating wilderness, social, and conference opportunities combined with the health, fitness and "spa" image already being marketed at places like the Hills will have uncommon market leverage -- especially as it appeals to the growing corporate recognition of health/fitness benefits.

Price

- If implementation of a trail use pricing strategy has not occurred to date, then it should be implemented. Pricing should be targeted to meet or be below competitor pricing for the same quality product. The augmented products should be relied upon for the major share of revenue.

Place

- Accessibility to 100 Mile House may be enhanced with tour bus packages or BC Rail packages. Again, a one-price approach is recommended.

Promotion

- Regional promotion should be intensified.
  - All sports stores.
  - All regional newspapers.
  - Establish a 1-800 number of "trail information".
  - Articles, Press Releases, etc. should be written and submitted to sports, outdoor newsletters and magazines (i.e.: PEDAL, SkiTrax, Velotique).
- Expand year round special events which can tie in with current events - but will increase media and promotion awareness of the region

- Undertake presentations to clubs, media groups "FAM Tours" throughout the year; attend key trade shows
- Develop a 100 Mile House "newsletter" for mass "direct" marketing.
- Packaging should begin to respond to visitor and market demands -- test the family package, survey for feedback and redesign packages to suit the market.
- Include a full range of trail experience opportunities for active/non-active participants, motorized and non-motorized
  - snowmobile rentals.
  - lake tours.
  - snow coach tours with cross-country ski.
  - mountain bike rentals/tours.
- Test destination markets in Alberta, Idaho, Washington, Oregon
- Develop a one-price package for destination markets
  - three or five day option.
  - include rental, events, attractions.
  - theme on wilderness experience, history, cultural experience, Super Natural BC
  - packages should sell realistically & preferably include accommodation, etc..
  - promote at trade shows, outdoor clubs, events, newspapers, ads.

Long-Term Plan (5-10 Years)

Product

- Trail product fully developed for complete range of experience.
  - Long distance (50 KM) loop in place.
  - High use nature/interpretive trails.
  - Motorized/non-motorized trails

- Existing facilities should invest in augmented products the tourists want to buy.
  - Waxing areas.
  - Gift shops with trail related products.
  - Restaurants with specialty food, at good prices.

- Saunas, hot tubs

- Shuttle services should be in place if it is demanded.

Place

- Air and bus charter packages should be tested, fine-tuned and ready for the destination market launch.

Price

- Hotels, motels, restaurants, should contribute to costs of operation -- either room based contribution with restaurant members contributing based on number of meals, or straight contribution to promotion through the Trails Foundation.

Promotion

- Launch "trail" vacation packages in major destination areas.
  - Alberta, Washington
  - Germany
- Continue strong promotion and service to local and regional markets -- these will continue to be the main source of visitors.

A large part of the 100 Mile - 108 Mile House marketing strategy will be to appeal to the wide range of target markets and specific market segments related to the wide range of trail opportunities the area should be able to provide with the planned improvements in overall product. The following **TABLE 9.1,** provides a brief overview of the more detailed approach that should be included with the overall marketing plan.

TABLE 9.1
MARKETING PLAN APPROACH

MARKET SEGMENT		MAJOR SOURCE	MEDIA
Package	hiking	B.C.	travel wholesalers
	equestrian	Alberta	Cariboo Tourist Assoc
	nature	Calif.	Sportsman Shows
	B'packing	Washington	Outdoor Recreation Shows
		Oregon	Tourism B.C.Publications
		Ontario	BC Outdoor Recreation Council
		Europe	Signage and posters
		Canadian Embassies	
			* Air B.C., B.C. Rail
			* Equipment Manufacturers
			* Equipment Distributors
			Travel Writers
			Rendezvous Canada
			Guide/Outfitters Assoc.
			* Orienteering Assoc. of B.C.
			* 100 Mile House C. Of C
			* 100 Mile Town office
			* Local hotels/ resorts
			* Referrals in major market areas
			Editorials
			Community clubs in major market areas
Special Events:			
	Trails Triathalon		TSN
	orienteering		Community TV (Kamloops)
	"Cariboo Gold Rush" days		Sponsorship marketing as marked * above
			newspapers in target market areas
Package	- Nordic Skiing	GVRD	Travel wholesalers
	- Snowmobiling	Interior BC	X-C/snowmobile magazines
		Washington	Public TV
		Alberta	CHEK TV
		Vancouver Island	Western Living
			Lifestyle publications (SHAPE)
			"travel writers"
			Club newsletters
			99 Mile Nordics Club
			Signage on principal approaches
Weekend	- x-c ski	GVRD	As above
	- snowmobile	Interior	
Special events			
	Marathon	GVRD	as marked with * above
		Washington	TSN
		Interior	Community TV
		Alberta	Posters
		Montana	Sponsorship market

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JACKSON SKI TOURING FOUNDATION

Village Trails

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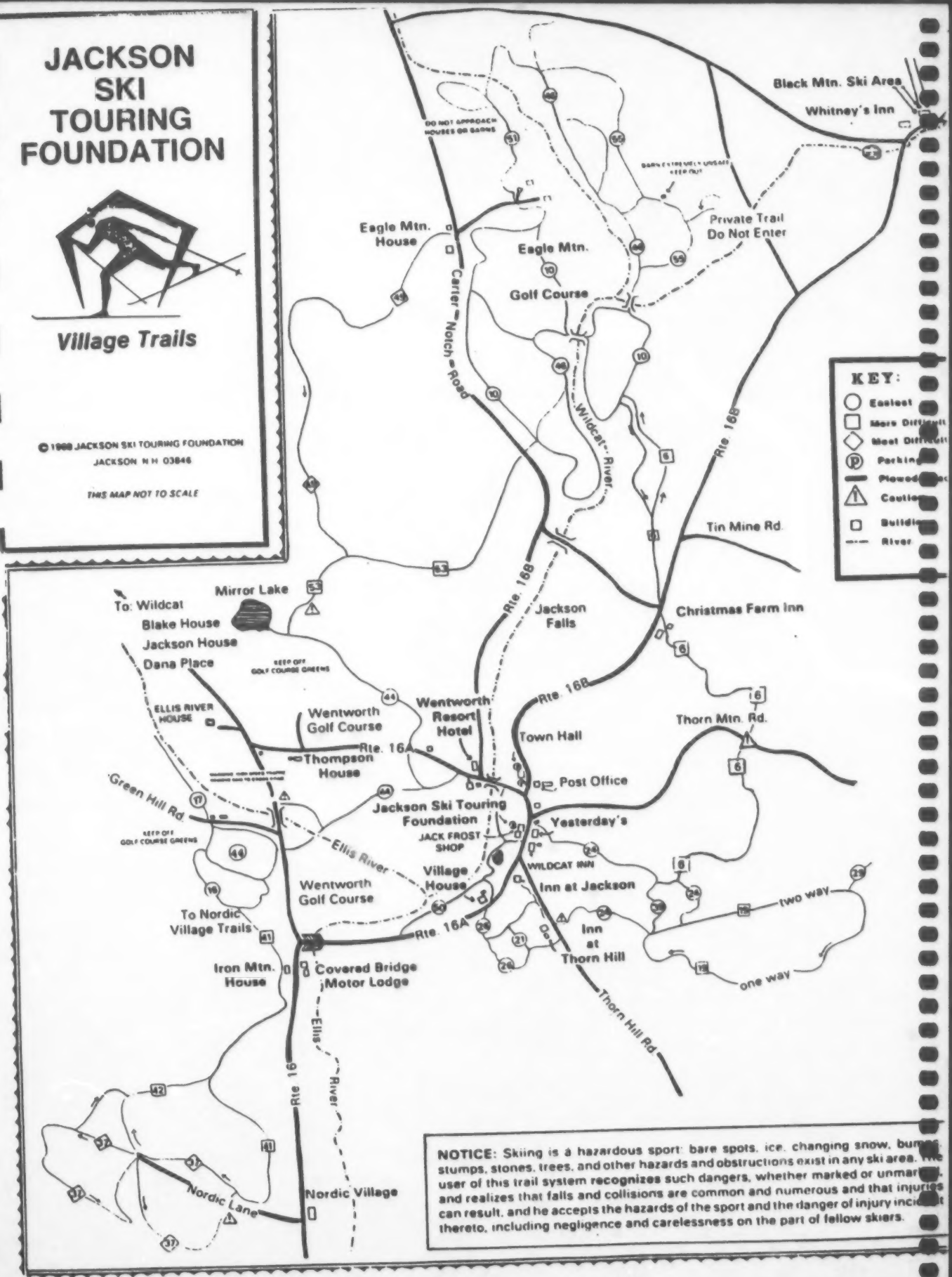
JACKSON N H 03846

THIS MAP NOT TO SCALE



NOTICE: Skiing is a hazardous sport: bare spots, ice, changing snow, bumps, stumps, stones, trees, and other hazards and obstructions exist in any ski area. The user of this trail system recognizes such dangers, whether marked or unmarked, and realizes that falls and collisions are common and numerous and that injuries can result, and he accepts the hazards of the sport and the danger of injury incident thereto, including negligence and carelessness on the part of fellow skiers.

EXAMPLE OF PRIVATE LAND LEASE

(Note: This Permit should be reviewed by an attorney and amended as necessary)

_____ All of
_____, (hereinafter called Lessors).
hereby lease to _____ (hereinafter called Lessees), as follows:

1. Land described as follows:_____
_____
_____

2. The premises shall be used for a recreational area.

3. The term of this lease shall be ___ years from the ef fective date of this lease.

4. The rental shall be _____.

5. This lease shall become effective upon the date the Lessees receive the last government permit or approval required to operate a Cross Country Ski business on the property for the 19__ - 19__ winter season. The Lessees shall notify each of the Lessors of the date the lease becomes effective. This lease shall not become effective if the last permit has not been received on or before _____, 19__.

6. The Lessees shall keep and maintain general public liability insurance on the property of at least $_____ single coverage for the benefit of the Lessors and Lessees.

7. In the event that the Lessees make improvements to the property that increase the tax valuation of the property, the Lessees shall pay the taxes resulting from such increase after the termination of this lease so long as the Lessors are the owners of the portion of the premises to which the improvements are connected or af fixed.

8. Each party doing any construction or other work agrees to pay for it, and discharge promptly any liens arising from it.

9. Lessors agree that Lessees on paying the rent and performing the Lessees' obligations of this lease shall peacefully and quietly have and hold and enjoy the leased premises through the term or until it is terminated as hereinafter provided.

10. Provided, also that these premises are upon this condition, that if the Lessees shall neglect or fail to perform or observe any of the covenants contained in these presents, and on their part to be performed or observed or if the estate hereby created shall be taken by execution, or by other process of law, or if the Lessees, shall be declared bankrupt or insolvent according to law, or if any assignment shall be made of their property for the benefit of creditors, then, and in any of the said cases (notwithstanding any license of any former breach of covenant or waiver of the benefit hereof or consent in a former instance), the Lessors lawfully may, immediately, or at any time thereafter, and without demand or notice, enter into and upon the said premises or any part thereof in the name of the whole, and repossess the same as of their former estate, and expel the Lessees and those claiming through or under them and remove their effects (forcibly if necessary) without being deemed guilty of any manner of trespass, and without prejudice to any remedies which might otherwise be used for arrears of rentor preceding breach of covenant, and upon entry as aforesaid this lease shall terminate and the Lessees covenant and agree notwithstanding any entry or re-entry by the Lessors whether by summary preceedings, termination or otherwise, to pay and be liable for on the days originally fixed herein for the payment thereof, amounts equal to the several installments of rents and other charges reserved as it would, under the terms of this lease become due if this lease had not been terminated or if the Lessors had not entered or re-entered as aforesaid, and whether the demised premises be re-let or remain vacant in whole or in part or for a period less than the remainder of the term, up to, but not exceeding the amount of any deficiency then existing (after crediting any rentals received by the Lessors from any source with respect to the said premises hereby demised) or at the election of the Lessors the Lessees will upon such termination pay to the Lessors as damages such a sum as at the time of the termination represents the rental value of the premises for the remainder of the term.

_____
Lessors

_____
Lessees

Seal

_____
Witness

_____ _____
Date Witness

Recommendations for Law Reform to Enhance Public Access to Outdoor Recreation

Prepared by the Outdoor Recreation Council of B.C.
with financial assistance from the Law Foundation of B.C.

October 1990

Introduction

Outdoor recreation is important to most British Columbians. With participation in outdoor recreation increasing, access to outdoor recreation opportunities is decreasing. Most recreationists and land managers agree that changes are needed to ensure outdoor recreation opportunities will continue to be available to British Columbians.

The Outdoor Recreation Council, with support from the Law Foundation of B.C., has conducted extensive research into problems affecting outdoor recreation access. The result is a collection of recommendations for legislative reform, presented here. These recommendations have been developed in close consultation with government personnel, recreationists and representatives from resource industry groups. In preparing the proposals, the goals of integrated resources management and the needs of all interests have been kept in mind.

The recommendations to government are:

1) Shift occupiers liability to recreationists through amendments to the Occupiers Liability Act.

2) Discourage inappropriate use of "no trespassing" signs on Crown land through changes to the Trespass Act.

3) Establish a user-respect program to facilitate public access to tenured land under the Trespass Act.

4) Provide a means for protecting recreation routes under the Forest Act.

5) Specify conditions for gating of forestry roads through regulations established under the Forest Act.

Most respondents were aware of specific instances where access to recreation opportunities is restricted due to land tenure, obstruction of backcountry roads, or improper posting of "no trespassing" signs. Of the recreationists, 93 percent knew of specific access restrictions, while 76 percent of land managers who responded could also identify restrictions.

As the data indicate, access to land and water for outdoor recreation in B.C. is a problem. The majority of recreationists (78 percent) and land managers (73 percent) agreed that something should be done to improve recreation access.

Recommendations

The recommendations which follow provide wide-spread public benefits to recreationists with minimal, if any, government resources. The proposed changes to legislation often provide important benefits to other interests as well. The recommendations involve:

1) Shifting occupiers liability to recreationists through amendments to the Occupiers Liability Act.

2) Discouraging inappropriate use of "no trespassing" signs on Crown land through changes to the Trespass Act.

3) Establishing a user-respect program to facilitate public access to tenured land under the Trespass Act.

4) Providing a means for protecting recreation routes under the Forest Act.

5) Specifying conditions for gating of forestry roads through regulations established under the Forest Act.